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Foreign Agriculture Circular

Grains

SG-1-86

January 10, 1986

USSR Grain Situation and Outlook

This month's report highlights 1986 winter grain crop prospects and increased Soviet buying activity.

Winter Grain Conditions for 1986 Crop

Above-normal December precipitation covered the western Ukraine, Belorussia, the Central Region, Volga Vyatsk Region and the Volga Valley. December's precipitation was below normal in Moldavia, the north central Ukraine, Black Soils Region, and parts of the North Caucasus. A brief cold snap covered major winter wheat areas in southern European USSR around December 20. In parts of southern Belorussia, the northcentral Ukraine, and the eastern Ukraine, nighttime lows ranged from -15C to -20C with isolated temperatures below -20C. The damage to winter wheat and barley in these areas was likely minimal, as lowest temperatures did not cover the same areas for more than one day and a protective snow cover likely existed in coldest areas. Since late December, rain has accompanied a warming trend in southern winter wheat areas. The warming trend has been most pronounced in the North Caucasus where daily temperatures have risen to around 10C above normal. Winter wheat is losing hardiness with some growth reported in the Crimea, making the crop more susceptible to sudden temperature declines. In addition, little if any snow cover exists throughout the southern Ukraine and North Caucasus. Typically, coastal areas along the Black Sea have snow cover by January 1.

The estimated size of the 1985 Soviet grain harvest remains unchanged at 190 million tons, including 83 million wheat, 94 million coarse grains and 13 million miscellaneous grains and pulses. The area estimate of 117.5 million hectares is also unchanged.

Import Estimate Holds

The estimate of USSR grain imports for July-June 1985/86 continues at 35 million tons, including 17 million each of wheat and coarse grains and one million of miscellaneous grains, rice, and pulses.

Approved by the World Agricultural Outlook Board - USDA

Soviet grain purchases from all origins now top 23 million tons with wheat estimated at over 14 million and coarse grain at nearly 9 million. Over the past month, transactions included significant purchases of U.S. corn, a large purchase of Australian wheat and more modest amounts of U.K. feed wheat and barley.

Market Shares May Be Shifting

So far during the 1985/86 marketing year, the United States appears to have been the major grain seller to the USSR followed closely by Canada and the EC.

Soviet purchases of U.S. grain currently stand at 6 million tons comprised almost entirely of corn. The majority of the corn sales still on the books are reportedly for shipment during the January-March period. Wheat purchases, all of which have been shipped, are negligible.

Canadian grain sales to the USSR are estimated at around 5 million tons. Wheat again comprises the bulk of these sales with some sources indicating that some Canadian feed wheat may have been sold to the Soviets. Under the last year of the current Canadian-USSR grain agreement (August-July 1985/86) the Canadians are to sell the Soviets 6 million tons of grain.

Sales from the EC were slow to develop this marketing year, however, big sales of French milling wheat during the fall have pushed the total for the entire year to nearly 5 million tons. Recent reports indicate that the U.K. may have sold 300-400,000 tons of feed quality wheat and 400,000 tons of barley to the Soviets. Other EC members are also likely to have made some small sales.

The level of Argentine grain sales to the USSR is shrouded in uncertainty. Adverse weather has resulted in a significant reduction in both the 1985 Argentine wheat crop and in the estimate of exportable supplies. This along with the continued absence of a significant Argentine wheat shipping program for the USSR raises some question about earlier reported sales of 1 to 2 million tons.

Australia recently reported the sale of a record 2.5 million tons of wheat to the USSR. This could result in the heaviest level of Australian wheat shipments to the USSR since the record 2.7 million tons in 1979/80.

Canada and USSR Negotiate a New Grain Agreement

Reports from Canada indicate that the USSR and Canada have concluded negotiations on a new long term grain trading agreement. The new agreement calls for the USSR to purchase a minimum of 25 million tons of grain between August 1, 1986 and July 31, 1991. In contrast with the prevailing agreement there are no annual minimum grain trading provisions. The current agreement provides for grain trade of 25 million tons over 5 years, however, in the first four years the Soviets have already purchased about 30 million tons of grain.

Utilization and Stock Estimates Unchanged

The estimates of total 1985/86 USSR grain utilization holds at 218 million tons. This is basically unchanged from the level of the past 2 years.

Hog Inventories Continue Recovery

Hog inventories on state and collective farms continued to recover with respect to year earlier numbers. By December 1, hog numbers were still 1 million below the previous year. This gap had been as large as 2.4 million in July and August. Continued emphasis on culling unproductive cows is evident in low inventories this month. Despite a 400,000 head decline in cow numbers from the same time last year, milk yields have improved enough for milk production to increase in 1985. The number of cattle other than cows was unchanged from the previous year's level.

USSR: Livestock Inventories on State and Collective Farms December 1, 1981-85

| | 1981 | 1982 | 1983 | 1984 | 1985 |
|-----------------|----------------|-------|-------|-------|-------|
| | -Million Head- | | | | |
| Cattle | 90.1 | 90.5 | 92.8 | 94.6 | 94.2 |
| of which cows | 29.7 | 29.7 | 29.7 | 29.6 | 29.2 |
| Hogs | 56.2 | 57.4 | 59.4 | 60.1 | 59.1 |
| Sheep and Goats | 116.6 | 115.4 | 117.5 | 115.8 | 113.5 |
| Poultry | 659.2 | 695.0 | 709.7 | 737.6 | 752.6 |

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1983 (Preliminary), 1984 (Estimate)
and 1985 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production 1/ (Million) (Metric Tons) |
|-------------------------|----------------------------|---|---|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Estimate) | 51.1 | 1.43 | 73.0 |
| 1985 (Forecast) | 50.2 | 1.65 | 83.0 |
| <u>Coarse Grains 2/</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
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| 1984 (Estimate) | 59.2 | 1.45 | 86.0 |
| 1985 (Forecast) | 57.8 | 1.63 | 94.0 |
| <u>Total Grain 3/</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Estimate) | 119.6 | 1.42 | 170.0 |
| 1985 (Forecast) | 117.5 | 1.62 | 190.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1985/86

| Year | Production | Trade (Jul/Jun) | Exports | Imports | Availability 1/ July/June | Total 1/ Metric Tons | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|-------------------|------------|-----------------|---------|---------|------------------------------|-------------------------|------|------------|------|----------------------|------|------------------------------|
| | | | | | | Total Grains 4/ 180 | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | 222 | | 219 | 27 | 4 | 47 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | 224 | | 218 | 27 | 4 | 47 | 19 | 121 | +6 |
| Projected 1985/86 | 190 | 35.0 | 1.0 | 224 | | 218 | 27 | 4 | 48 | 18 | 121 | +6 |
| | | | | | | Wheat | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | 99 | | 97 | 15 | 1 | 36 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | 100 | | 96 | 15 | 1 | 36 | 8 | 36 | +4 |
| Projected 1985/86 | 83 | 17.0 | 1.0 | 99 | | 95 | 15 | 1 | 37 | 8 | 34 | +4 |
| | | | | | | Coarse Grains | | | | | | |
| 1975/76 | 66 | 15.6 | -- | 81 | | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | | 100 | 11 | 3 | 7 | 12 | 57 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 99 | 11.5 | -- | 110 | | 109 | 11 | 3 | 7 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 86 | 26.9 | -- | 113 | | 111 | 11 | 3 | 7 | 10 | 80 | +2 |
| Projected 1985/86 | 94 | 17.0 | -- | 111 | | 109 | 11 | 3 | 7 | 9 | 79 | +2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

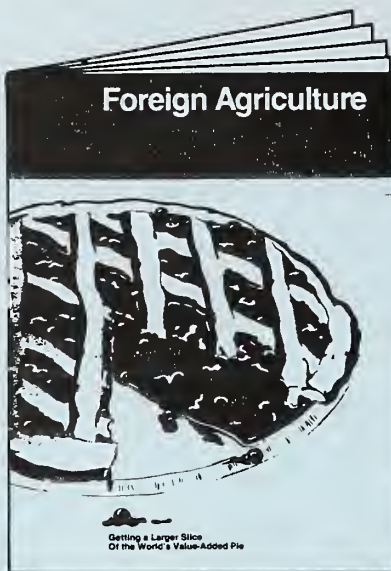
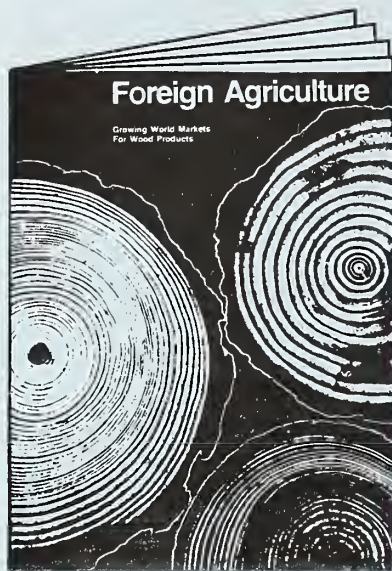
2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.



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Winter Grain Conditions for 1986 Crop

CURRENT SERIAL RECORDS

Above-normal January precipitation covered most winter grain areas, increasing moisture supplies. However, precipitation continued below normal in the southwestern Ukraine, Moldavia, and parts of the central North Caucasus. Temperatures during January were 2C to 5C above normal over much of European USSR. Warmest weather occurred during the last 10 days, with above freezing temperatures reported as far north as the Central Region. As a result of the unseasonably warm weather conditions, snow cover diminished over most of the Ukraine and North Caucasus. In early February, bitter cold air from Siberia crept westward, covering most winter grain areas in European USSR. In northern crop areas, minimum temperatures around -20C approached the threshold for potential winterkill, but sufficient snow cover likely protected winter grains. In major winter wheat areas of the Ukraine and North Caucasus, minimum temperatures ranged from -15C to -20C. Snow accompanied the cold weather in some areas, protecting winter grains. Overall, temperatures did not fall low enough to produce widespread winterkill, however, some areas were more vulnerable, particularly those adjacent to the Black Sea where some crop growth was reported in January.

Import Estimate Unchanged; Buying Continues

The estimate of USSR grain imports for July-June 1985/86 remains at 35 million tons, including 17 million of wheat and coarse grains and one million of miscellaneous grains, rice, and pulses.

Soviet grain buying activity was modest over the past month with total purchases thus far from all origins now estimated at nearly 26 million tons. Wheat purchases continue to swell with the Soviets having covered over 90 percent of their projected imports of 17 million tons. Coarse grain purchases have been much slower to develop with total purchases now estimated at close to 10 million tons. The EC was the major seller this past month. EC grain sales for delivery during July-June 1985/86 are now estimated at over 6 million tons. France has been the major seller, followed by West Germany, the U.K., and Italy. Other EC countries have also made some sales.

In contrast, Argentina appears to have sold very little wheat to the USSR. This year's poor wheat harvest has sharply reduced Argentina's export availability, and new crop sales to the USSR may total less than 500,000 tons. It now appears that optional origin sales to the USSR, that were earlier expected to come from Argentina, may have been switched or cancelled. Argentine wheat sales for the July-June 1985/86 period may be the smallest since 1978/79.

Approved by the World Agricultural Outlook Board - USDA

Argentine Grain Exports to USSR
July-June Years
million tons

| | 1979/80 | 1980/81 | 1981/82 | 1982/83 | 1983/84 | 1984/85 |
|---------------|---------|---------|---------|---------|---------|---------|
| Wheat | 2.0 | 3.0 | 3.1 | 4.2 | 3.6 | 4.1 |
| Corn | 2.5 | 5.4 | 6.9 | 2.5 | 1.4 | 2.4 |
| Grain Sorghum | .6 | 2.8 | 3.3 | 2.9 | 1.9 | 1.5 |
| Total Grain | 5.1 | 11.2 | 13.3 | 9.6 | 6.9 | 8.0 |

Argentina-USSR Extend Grain Agreement

Argentina and the USSR have agreed to extend the 1980/85 grain agreement for another 5 years. The total amount of grains and soybeans to be purchased annually by the USSR remains at 4 million tons of coarse grains and 500,000 tons of soybeans. As in the earlier agreement, wheat trade is not included.

Livestock Numbers Fall

Recently published year beginning livestock inventories for 1986 included private sector livestock data. For the first time since 1969, beginning year inventories for both cattle and hogs were lower than previous year numbers. Inventories of cows, and sheep and goats were also lower. The small decline in hog numbers would indicate that herd building in the socialized sector, which began last summer, is nearly completed, with little if any decline in private sector hog numbers during 1985. The decline in total cow numbers was likely shared by both the socialized and private sectors.

USSR: Livestock Inventories on all Farms
January 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|------------------|---------|---------|---------|---------|-------|
| --Million Head-- | | | | | |
| Cattle | 115.9 | 117.2 | 119.6 | 121.0 | 120.7 |
| of which hogs | 43.7 | 43.8 | 43.9 | 43.6 | 42.8 |
| Hogs | 73.3 | 76.7 | 78.7 | 77.9 | 77.6 |
| Sheep and Goats | 148.5 | 148.5 | 151.8 | 149.2 | 146.5 |
| Poultry | 1,067.5 | 1,104.5 | 1,126.1 | 1,143.0 | N/A |

N/A = not available.

Soviets Announce Plan Fulfillment

The Central Statistical Administration released data on the 1985 economic performance in the Soviet Union. The data suggest a 3.5 percent improvement in labor productivity, and a 3.9 percent increase in total industrial output. The Soviets reported that gross agricultural output remained at 1984 levels. Increases in animal products, and grain, cotton and sunflowerseed output were offset by declines in sugarbeets (4 percent), potatoes (15 percent), and vegetables (9 percent).

In keeping with the practice of the last several years, the Soviets said little about the performance of the grain economy. In 1985, a major Soviet agricultural goal was to increase the production and use of agricultural inputs, particularly on grain and feed crops. This year the Soviets reported an 8 percent increase in the production of mineral fertilizer and a 10 percent increase in fertilizer deliveries to farms. Tractor production increased 4 percent in 1985.

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1981-1983 (Preliminary), 1984 (Estimate)
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| Year | Production | Trade (Jul/Jun) | Imports | Exports | Availability 1/ July/June | Total 1/ Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|-------------------|------------|-----------------|---------|---------|------------------------------|-----------------------|------------|------|----------------------|------|------------------------------|
| | | | | | | (Million Metric Tons) | | | | | |
| | | | | | | Total Grains 4/ | | | | | |
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| 1977/78 | 196 | 18.9 | 2.3 | | 213 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | | 250 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | | 209 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | | 223 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | | 206 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | | 212 | 27 | 4 | 47 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | | 222 | 27 | 4 | 47 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | | 224 | 27 | 4 | 47 | 19 | 121 | +6 |
| Projected 1985/86 | 190 | 35.0 | 1.0 | | 224 | 27 | 4 | 48 | 18 | 121 | +6 |
| | | | | | | Wheat | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | | 76 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | | 100 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | | 98 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | | 125 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | | 102 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | | 114 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | | 99 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | | 99 | 15 | 1 | 36 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | | 100 | 15 | 1 | 36 | 8 | 36 | +4 |
| Projected 1985/86 | 83 | 17.0 | 1.0 | | 99 | 15 | 1 | 37 | 8 | 34 | +4 |
| | | | | | | Coarse Grains | | | | | |
| 1975/76 | 66 | 15.6 | -- | | 81 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | | 119 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | | 103 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | | 114 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | | 99 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | | 98 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | | 97 | 11 | 3 | 7 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 99 | 11.5 | -- | | 110 | 11 | 3 | 7 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 86 | 26.9 | -- | | 113 | 11 | 3 | 7 | 10 | 80 | +2 |
| Projected 1985/86 | 94 | 17.0 | -- | | 111 | 11 | 3 | 7 | 9 | 79 | +2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total <u>2/</u> |
|--------------|-------|--------|-----------------|-----------------|-----------|-----------|-----------------|
| July 1983 | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 | 933 | 3,641 | |
| June | 255 | 1,124 | --- | 155 | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 845 | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 59 | 286 | 2,143 | |
| August | 1,231 | 1,408 | 115 | 444 | 330 | 3,528 | |
| September | 2,172 | 1,254 | 132 | 943 | 293 | 4,794 | |
| July-Sept | 3,662 | 4,143 | 305 | 1,446 | 909 | 10,465 | 11,300 |
| October | 2,320 | 809 | 152 | 966 | 302 | 4,549 | |
| November | 3,014 | 961 | 244 | 840 | 99 | 5,158 | |
| December | 3,535 | 96 | 100 | 512 | 230 | 4,473 | |
| Oct-Dec | 8,869 | 1,866 | 496 | 2,318 | 631 | 14,180 | 14,800 |
| January 1985 | 2,218 | 98 | 154 | 599 <u>3/</u> | 1,082 | 4,151 | |
| February | 2,196 | --- | 347 | 546 <u>3/</u> | 1,248 | 4,337 | |
| March | 2,023 | 17 | 532 | 924 <u>3/</u> | 926 | 4,416 | |
| Jan-March | 6,437 | 115 | 1,033 | 2,069 <u>3/</u> | 3,256 | 12,910 | 14,000 |
| April | 2,016 | 388 | 698 <u>3/</u> | 930 | 1,225 | 5,257 | |
| May | 1,566 | 1,237 | 468 <u>3/</u> | 921 | 1,368 | 5,560 | |
| June | 106 | 481 | 211 <u>3/</u> | 1,116 | 580 | 2,494 | |
| April-June | 3,688 | 2,106 | 1,377 <u>3/</u> | 2,967 | 3,173 | 13,311 | 14,700 |
| July | 8 | --- | 25 <u>3/</u> | 205 <u>3/</u> | 443 | 681 | |
| August | --- | --- | --- | 152 <u>3/</u> | 281 | 433 | |
| September | --- | 1,384 | 25 <u>3/</u> | 75 <u>3/</u> | 59 | 1,543 | |
| July-Sept | 8 | 1,384 | 50 <u>3/</u> | 432 <u>3/</u> | 783 | 2,657 | 4,200 |
| October | 411 | 1,057 | 89 <u>3/</u> | 300 <u>3/</u> | 316 | 2,173 | |
| November | 2,487 | 900 | 212 <u>3/</u> | 700 <u>3/</u> | 423 | 4,722 | |
| December | 1,337 | 750 | N/A | 800 <u>3/</u> | 57 | 2,944 | |
| Oct-Dec | 4,235 | 2,707 | 301 <u>3/</u> | 1,800 <u>3/</u> | 796 | 9,839 | 11,500 |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

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Grains

MAR 31 '86

USSR Grain Situation and Outlook

SG 3-86
March 1986

Weather Conditions for the 1986 Crop

Precipitation during February was below normal over much of European USSR except for the central Ukraine, Black Soils Zone, and the central North Caucasus where precipitation was above normal. February temperatures over Soviet winter grain areas were 2 to 6 degrees C below normal. In most cases, a protective snow cover preceded the coldest weather, protecting most winter grains from widespread winterkill. In early March, bitter cold weather continued across European USSR, with night temperatures dropping to around -25 degrees C as far south as Krasnodar, North Caucasus. Snow cover likely protected winter grains from severe winterkill. Recently, temperatures moderated to above freezing over winter grain areas, melting snow. The southward extent of the early March snow cover lies from the central Ukraine through the lower Volga, which is normal for this time of the year.

Import Estimate Reduced

The estimate of USSR grain imports for July-June 1985/86 has been reduced by 1 million tons to 34 million. Coarse grain imports, previously estimated at 17 million tons, have been reduced by 2 million while the estimate of wheat imports has been increased by a million tons to 18 million. Miscellaneous grains, rice and pulses account for the balance.

USSR coarse grain buying activity continues to lag, with purchases as of early March from all origins estimated at only about 10 million tons. So far, the USSR has shown little interest in new-crop Argentine corn and sorghum supplies. USSR barley purchases also continue to lag with little evidence of significant new sales of either Canadian or EC barley. Barley imports for the first 6 months are estimated at only around 700,000 tons. Meanwhile, the USSR is close to cleaning up outstanding purchases of U.S. corn, with only slightly over 100,000 tons still to be shipped as of late February. Prospects for record large exportable supplies of Argentine corn, and the recent price weakness in the major world coarse grain markets, may be encouraging the Soviet Union to at least temporarily delay further coarse grain purchases.

One factor that may have contributed to the USSR's reduced coarse grain import demand is the import of feed wheat from the EC and Canada. The bulk of the reported 400,000 tons of wheat sales by the U.K. are thought to be of feed wheat quality. At least a portion of the Canadian wheat for the spring shipping program has been rumored to be feed wheat. Given the Soviet Union's heavy use of wheat in domestic feed rations, and the large supplies of feed quality wheat

around the world this year, it would not be surprising for the Soviets to have purchased significant quantities of feed wheat.

In contrast to the current pace of Soviet coarse grain purchases, Soviet wheat buying worldwide has exceeded expectations. Total commitments from all origins are currently estimated at nearly 17 million tons. Canada and the EC have been the largest sellers to date with each estimated to have wheat sales of around 5 million tons on the books. Australia appears to be headed toward record wheat trade with the Soviets with sales of around 3 million tons. Soviet wheat purchases from non-U.S. origins are expected to total around 17 million tons, second only to last year's level of over 21 million. Since July-June 1979/80, Soviet purchases of non-U.S. wheat have risen from around 8 million tons to the 1984/85 peak of over 21 million.

U.S. Shipping Program Slows

As of March 3, USSR grain purchases from the United States for delivery in the third year of the new U.S.-USSR Grain Agreement totaled 6.3 million tons, including 153,000 tons of wheat and over 6.1 million of corn. As of March 3, all but 129,000 tons of corn had been shipped. The following table shows U.S. grain shipments to the USSR, since the first U.S.-USSR Grain Agreement went into effect in October-September 1976/77.

| <u>Year</u> | <u>Wheat</u> | <u>Corn</u> | <u>Total</u> | <u>Agreement Minimum</u> |
|-------------|--------------|-------------------------------|--------------|--------------------------|
| | | - - - <u>1,000 Tons</u> - - - | | |
| 1976/77 | 3064 | 3052 | 6116 | 6000 |
| 1977/78 | 3453 | 11132 | 14585 | 6000 |
| 1978/79 | 3971 | 11530 | 15501 | 6000 |
| 1979/80 | 2171 | 5768 | 7939 | 6000 |
| 1980/81 | 3780 | 5738 | 9518 | 6000 |
| 1981/82 | 6097 | 7772 | 13869 | 6000 |
| 1982/83 | 2999 | 3208 | 6207 | 6000 |
| 1983/84 | 7593 | 6476 | 14069 | 9000 |
| 1984/85 | 2887 | 15751 | 18637 | 9000 |

Domestic Use Estimate Unchanged

The reduction in the import estimate has been accommodated by a 1-million ton reduction in the estimated stock increase for 1985/86. In addition, small adjustments were made in the estimate of wheat and coarse grain used for feed. However, the total grain for feed estimate is unchanged.

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1983 (Preliminary), 1984 (Estimate)
and 1985 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production 1/ (Million) (Metric Tons) |
|-------------------------|----------------------------|---|---|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Estimate) | 51.1 | 1.43 | 73.0 |
| 1985 (Forecast) | 50.2 | 1.65 | 83.0 |
| <u>Coarse Grains 2/</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Preliminary) | 61.2 | 1.62 | 99.0 |
| 1984 (Estimate) | 59.2 | 1.45 | 86.0 |
| 1985 (Forecast) | 57.8 | 1.63 | 94.0 |
| <u>Total Grain 3/</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Estimate) | 119.6 | 1.42 | 170.0 |
| 1985 (Forecast) | 117.5 | 1.62 | 190.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1985/86

| Year | Production | Trade (Jul/Jun) | Exports | Availability 1/ July/June | Total 1/ Metric Tons | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|-------------------|------------|-----------------|---------|------------------------------|-------------------------|------|------------|------|----------------------|------|------------------------------|
| | | Imports | | | (Million Metric Tons) | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | 222 | 219 | 27 | 4 | 47 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | 224 | 218 | 27 | 4 | 47 | 19 | 121 | +6 |
| Projected 1985/86 | 190 | 34.0 | 1.0 | 223 | 218 | 27 | 4 | 48 | 13 | 121 | +5 |
| | | | | | Wheat | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | 99 | 97 | 15 | 1 | 36 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | 100 | 96 | 15 | 1 | 36 | 8 | 36 | +4 |
| Projected 1985/86 | 83 | 18.0 | 1.0 | 100 | 96 | 15 | 1 | 37 | 8 | 35 | +4 |
| | | | | | Coarse Grains | | | | | | |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 99 | 11.5 | -- | 110 | 109 | 11 | 3 | 7 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 86 | 26.9 | -- | 113 | 111 | 11 | 3 | 7 | 10 | 80 | +2 |
| Projected 1985/86 | 94 | 15.0 | -- | 109 | 108 | 11 | 3 | 7 | 9 | 78 | +1 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

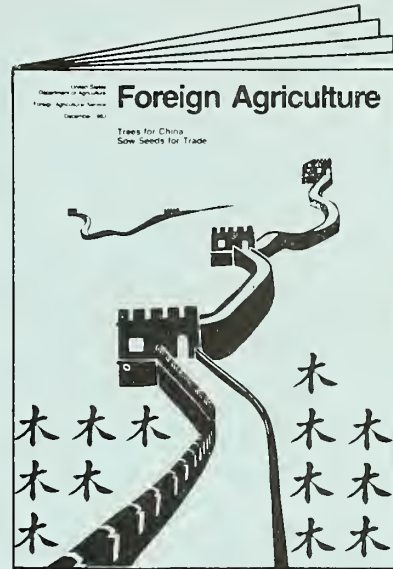
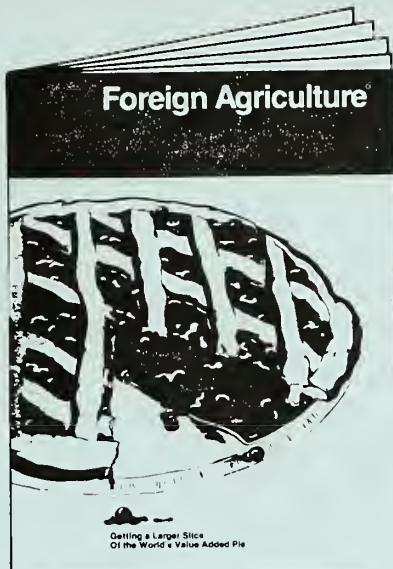
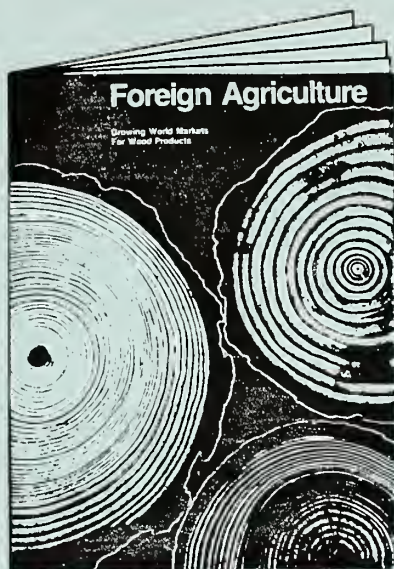
3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

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Agricultural Transportation Conference

The U.S. Department of Agriculture will hold an agricultural transportation conference in St. Louis, Missouri, May 13-15.

Conference workshops will include updates on the effects of rail and truck deregulation, highway costs, U.S. waterway issues, options to deal with the growing crisis of America's rural roads and bridges, and export perspectives for 1986 and beyond.

The conference contact is Ronald R. Vail, Office of Transportation, Room 1405, Auditor's Bldg., Washington, D.C. 20250. Tel: (202) 447-6793.

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Grains

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April 1986

USSR Grain Situation and Outlook

CURRENT RECORDS

The continued sluggish pace of USSR grain buying has prompted a 3 million ton reduction in the 1985/86 import estimate to 31 million. Precipitation over much of the European USSR continued below normal this past month. However, in contrast to February, temperatures averaged above normal promoting early plant growth in a number of areas.

Weather Conditions for the 1986 Crop

March precipitation was well below normal throughout most of European USSR. Examination of historical March precipitation data for various locations in the southern and eastern Ukraine, Black Soils Region, North Caucasus, and the lower Volga Valley shows that this March was the driest for which comparative data is available, i.e. the past 36 years. This unusual dryness probably had little impact on winter grains just breaking dormancy in the south, and was highly favorable for early spring fieldwork. Despite March's dry weather, precipitation accumulations from December through March were near normal over most winter grain areas, helping to increase soil moisture reserves. Temperatures during March were above normal, and Soviet press accounts report that in the north, snow cover diminished earlier than usual. March's warming trend has continued to the present. Soviet press accounts also report that winter grains in the Ukraine, North Caucasus, the southern Central Black Soil zone, and lower Volga broke dormancy 5-10 days earlier than usual. Winter grains in the extreme north likely remain dormant but are losing hardiness. A greening of the crop was observed, reaching the southern Ukraine as of April 1. In Central Asia, winter grains broke dormancy later than normal due to below-normal March temperatures. During the past several days, temperatures in the Ukraine, North Caucasus, and lower Volga have risen to well above normal. Daytime highs were around 25 degrees C, promoting early growth and reducing topsoil moisture. Rain is needed to meet the increasing crop moisture requirements and for germination of newly sown spring crops.

Import Estimate Reduced Again

The estimate of USSR grain imports for the 1985/86 marketing year has been reduced by 3 million tons to 31 million, the lowest level of imports since 1979/80. The estimates of wheat and coarse grain imports were cut by 1 million and 2 million tons, respectively. The new wheat import estimate of 17 million tons is 11 million tons less than in 1984/85. Coarse grain imports, estimated at only 13 million tons, are less than half of last year's record level.

USSR grain buying activity remained sluggish over the past month with total purchases from all origins for 1985/86 delivery now estimated at around 27 million tons. Argentine corn and sorghum sales appeared to be the only major new business.

A number of factors may be contributing to the reduced level of USSR grain buying.

--Over the past 2 years, the Soviets have been able to replenish depleted stocks, possibly reducing the need to add substantially to grain stocks this year.

--Expectations of lower world grain prices this summer and fall, as a result of the new U.S. farm legislation, may be encouraging the USSR to delay late season grain purchases as much as possible.

--Lower revenues from oil exports, a major source of foreign exchange, may be reflected in reduced USSR expenditures on imports, particularly for grain.

--Weather was milder than usual during December-January which may have reduced grain for feed requirements.

--Increased soybean purchases--the USSR has already purchased 1.5 million tons of soybeans compared with less than a million tons during the entire 1984/85 marketing year.

Domestic Use Estimate Unchanged

Despite a 3 million ton reduction in projected total grain supplies, the utilization estimate for 1985/86 is unchanged at 218 million tons. The lower import estimate has been accommodated by a cut back in the projected increase in stocks this marketing year.

Update on Country Sales Activity

--U.S.: Sales to date for the July/June marketing year total over 6.2 million tons of which corn accounts for 6.1 million. As of early April, shipments had been completed. Given the continued absence of USSR grain purchases, total U.S. sales are likely to fall below earlier expectations.

--Canada: The last year of the USSR-Canadian Grain Agreement calls for sales of 6 million tons of grain. Sales are currently believed to be somewhat short of this level. Since the start of the 1985/86 marketing year, the Soviets have lifted over 4 million tons of Canadian wheat, however, since December shipments have slowed to a trickle. There has been little indication of any barley sales and total barley sales for the year may fall short of earlier estimates.

--EC: After a slow start, sales to the USSR have climbed to around 6 million tons. France again is the major seller followed by West Germany, the U.K., and Italy. The pace of exports has also accelerated sharply, averaging close to a million tons a month during the December-February period. Some EC barley sales were announced earlier, however, in recent months, there appears to have been few followup sales. Consequently, total grain sales are expected to fall short of last year's record level.

--Australia: Wheat sales to the USSR from this year's crop are estimated at a record of around 3 million tons. Based on reports from the Australian Wheat Board, shipments to the USSR were extremely large during the January-March period totaling nearly 1.9 million tons. This brings the total wheat trade with the USSR to 2.3 million tons since July.

--Argentina: Wheat sales to the USSR are now projected at only around one million tons, reflecting the significant reduction in export availabilities this year. Over the past 3 months, traditionally a heavy shipment period, Argentine wheat shipments to the USSR have been negligible. The Argentine-USSR grain trade agreement calls for annual coarse grain trade of 4 million tons during calendar 1986. To date sales, principally corn, are thought to total only around 1.5 million tons. The limited export availabilities for Argentine grain sorghum have been reflected in lower expected shipments to the USSR.

Area Data Released

The Soviets have released final 1985 area numbers by grain type. The total grain area was 117.9 million hectares, compared with the estimated 117.5 million. Grains in 1985 occupied the smallest area since 1971. While production continues to be estimated at 190 million tons, its composition has been changed slightly. Corn production is now estimated at 13.5 million tons, up 1 million from last month, because of a higher area. Spring barley production was dropped 1 million tons, offsetting the increase in corn output.

The USSR released final 1985 grain area numbers in the March edition of Vestnik Statistiki. The break down by grain type is as follows.

USSR: SOWN AREA 1984 and 1985 1,000 Hectares

| | <u>1984</u> | <u>1985</u> |
|------------------------|-------------|-------------|
| Total Sown Area | 212,566 | 210,286 |
| --Grains and Pulses | 119,612 | 117,939 |
| --Inc. | | |
| --Winter Wheat | 17,956 | 17,996 |
| --Spring Wheat | 33,105 | 32,269 |
| --Winter Rye | 9,337 | 9,451 |
| --Spring Rye | 83 | 69 |
| --Winter Barley | 1,651 | 1,224 |
| --Spring Barley | 28,775 | 27,834 |
| --Oats | 12,806 | 12,604 |
| --Corn For Grain | 3,919 | 4,482 |
| --Millet | 2,640 | 2,808 |
| --Buckwheat | 1,694 | 1,689 |
| --Rice | 688 | 671 |
| --Sorghum | 143 | 187 |
| --Spelt | 5 | 5 |
| --Mixed Grains | 108 | 127 |
| --Pulses | 6,702 | 6,523 |
| --Inc. | | |
| --Peas | 5,434 | 5,337 |
| --Beans | 53 | 57 |
| --Lentils | 32 | 37 |
| --Feed Beans | 22 | 21 |
| --Vetch | 828 | 821 |
| --Feed Lupine (Sweet) | 286 | 215 |
| --Feed Lupine (Bitter) | 1 | 3 |
| --Seradella | 0 | 0 |
| --Other Pulses | 46 | 32 |

For the first time since 1980 the USSR published grain area data by republic.

AREA FOR SELECTED GRAIN BY REPUBLIC
-Million Hectares-

| | RSFSR | | UKRAINE | | KAZAKHSTAN | | OTHERS | |
|----------------|-------|------|-----------|-----------|------------|------|-----------|-----------|
| | 1980 | 1985 | 1980 | 1985 | 1980 | 1985 | 1980 | 1985 |
| Winter Wheat | 11.1 | 8.4 | 8.0 | 6.7 | 1.2 | 1.0 | 2.3 | 2.0 |
| Spring Wheat | 22.9 | 16.9 | <u>1/</u> | <u>1/</u> | 15.8 | 15.2 | .2 | .2 |
| Rye | 6.1 | 7.3 | .8 | .7 | .3 | .2 | 1.4 | 1.4 |
| Corn for Grain | .6 | 1.1 | 1.5 | 2.6 | .1 | .1 | .8 | .7 |
| Barley | 18.6 | 16.1 | 3.5 | 3.1 | 6.1 | 6.8 | 3.4 | 2.9 |
| Oats | 9.9 | 11.0 | .7 | .6 | .5 | .4 | .7 | .6 |
| Milled | 1.7 | 1.7 | .3 | .3 | .8 | .8 | .1 | <u>1/</u> |
| Buckwheat | 1.1 | 1.1 | .4 | .3 | .2 | .2 | <u>1/</u> | <u>1/</u> |
| Rice | .4 | .3 | <u>1/</u> | <u>1/</u> | .1 | .1 | .2 | .2 |
| Pulses | 3.0 | 4.2 | 1.2 | 1.6 | .1 | .2 | .4 | .6 |

1/ Less than 50,000 hectares

Targets for New Five Year Plan

Agricultural production goals for the USSR's 12th Five Year Plan (1986-90) are quite ambitious in comparison with actual performance in recent years. Gross agricultural output is to increase 2.7-3.0 percent a year, compared with just 1.1 percent a year during 1981-85. Grain production in particular is slated for a major increase and is targeted to reach 250-255 million tons by 1990 compared with an estimated 178 million tons during 1981-85. Meat production is targeted to reach 20.5-21 million tons by 1990. To reach this goal, meat production growth rates would have to more than double over those of the last 5 years.

New Decree in Agriculture

On March 29, a lengthy decree on steps to improve the performance of Soviet agriculture was published. The decree allows for greater flexibility in food marketing at the regional and local level by establishing set targets for supply of agricultural commodities to the State and allowing farms leeway in marketing production above this amount. The decree also attempts to integrate private plot production more fully into the State planning process, by calling on state and collective farms

to consider the needs of private plot operators when formulating annual plans and by improving marketing links between the private plots and the cooperative retail network. Numerous other measures are contained, addressing the problems of worker incentives, credit and investment policies in agriculture, price policy, and the need for more reliable cost accounting at the farm level. In these areas, the decree places heavy reliance on new state set norms and a slight modification of existing practice rather than a significant shift in policy.

Prepared by the USDA Interagency Task Force on the USSR Grain Situation

USSR Grain Area, Yield, and Production
1975-1980,
1981-1983 (Preliminary), 1984 (Estimate)
and 1985 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production 1/ (Million) (Metric Tons) |
|-------------------------|----------------------------|---|---|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Estimate) | 51.1 | 1.43 | 73.0 |
| 1985 (Forecast) | 50.3 | 1.65 | 83.0 |
| <u>Coarse Grains 2/</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Preliminary) | 61.2 | 1.62 | 99.0 |
| 1984 (Estimate) | 59.2 | 1.45 | 86.0 |
| 1985 (Forecast) | 58.5 | 1.61 | 94.0 |
| <u>Total Grain 3/</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Estimate) | 119.6 | 1.42 | 170.0 |
| 1985 (Forecast) | 117.9 | 1.61 | 190.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1985/86

| Year | Production | Imports | Exports | Availability 1/ July/June | Total 1/ Metric Tons | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|-------------------|------------|---------|---------|------------------------------|--------------------------------|------|------------|------|----------------------|------|------------------------------|
| | | | | | Total Grains 4/ Metric Tons | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | 222 | 219 | 27 | 4 | 47 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | 224 | 218 | 27 | 4 | 47 | 19 | 121 | +6 |
| Projected 1985/86 | 190 | 31.0 | 1.0 | 220 | 218 | 27 | 4 | 48 | 18 | 121 | +2 |
| | | | | | Wheat | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | 99 | 97 | 15 | 1 | 36 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | 100 | 96 | 15 | 1 | 36 | 8 | 36 | +4 |
| Projected 1985/86 | 83 | 17.0 | 1.0 | 99 | 97 | 15 | 1 | 37 | 8 | 36 | +2 |
| | | | | | Coarse Grains | | | | | | |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 99 | 11.5 | -- | 110 | 109 | 11 | 3 | 7 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 86 | 26.9 | -- | 113 | 111 | 11 | 3 | 7 | 10 | 80 | +2 |
| Projected 1985/86 | 94 | 13.0 | -- | 107 | 107 | 11 | 3 | 7 | 9 | 77 | 0 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

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USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|--------------|-------|--------|-----------|----------|-----------|-----------|----------|
| July 1983 | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 | 933 | 3,641 | |
| June | 255 | 1,124 | --- | 155 | 612 | 2,145 | |
| April-June | 3,293 | 2,424 | 688 | 845 | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 59 | 286 | 2,143 | |
| August | 1,231 | 1,408 | 115 | 444 | 330 | 3,528 | |
| September | 2,172 | 1,254 | 132 | 943 | 293 | 4,794 | |
| July-Sept | 3,662 | 4,143 | 305 | 1,446 | 909 | 10,455 | 11,300 |
| October | 2,320 | 809 | 152 | 966 | 302 | 4,549 | |
| November | 3,014 | 961 | 244 | 840 | 99 | 5,158 | |
| December | 3,535 | 96 | 100 | 512 | 230 | 4,473 | |
| Oct-Dec | 8,869 | 1,866 | 496 | 2,318 | 631 | 14,180 | 14,800 |
| January 1985 | 2,218 | 98 | 154 | 599 | 1,082 | 4,151 | |
| February | 2,196 | --- | 215 | 572 | 1,248 | 4,231 | |
| March | 2,023 | 17 | 667 | 934 | 926 | 4,567 | |
| Jan-March | 6,437 | 115 | 1,036 | 2,105 | 3,256 | 12,949 | 14,000 |
| April | 2,016 | 388 | 716 | 930 | 1,225 | 5,275 | |
| May | 1,566 | 1,237 | 468 | 921 | 1,368 | 5,560 | |
| June | 106 | 481 | 211 | 1,116 | 580 | 2,494 | |
| April-June | 3,688 | 2,106 | 1,395 | 2,967 | 3,173 | 13,329 | 14,700 |
| July | 8 | --- | 25 | 208 3/ | 443 | 684 | |
| August | --- | --- | --- | 152 3/ | 281 | 433 | |
| September | --- | 1,384 | --- | 75 3/ | 59 | 1,518 | |
| July-Sept | 8 | 1,384 | 25 | 435 3/ | 783 | 2,635 | 4,200 |
| October | 411 | 1,057 | 89 | 200 3/ | 316 | 2,073 | |
| November | 2,487 | 900 | 212 | 600 3/ | 423 | 4,622 | |
| December | 1,337 | 750 | 101 | 1,100 3/ | 57 | 3,345 | |
| Oct-Dec | 4,235 | 2,707 | 402 | 1,900 3/ | 796 | 10,040 | 11,500 |
| January 1986 | 980 | 171 | 450 | 1,150 3/ | 15 | 2,766 | |
| February | 956 | --- | 500 | 1,000 3/ | --- | 2,456 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

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Grains

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USSR Grain Situation and Outlook

Weather and Crop Prospects

CURRENT SERIAL RECORDS

The initial USDA forecast of the 1986 Soviet grain crop is 190 million tons, the same as the 1985 estimated crop. The estimate includes 80 million tons of wheat, 98 million coarse grains and 12 million miscellaneous grains and pulses. Total grain area is estimated at 118 million hectares, marginally above 1985's area of 117.9 million hectares. The area estimates are 49 million hectares of wheat, 59.5 million of coarse grains and 9.5 million of miscellaneous grains and pulses. Winter grain output is estimated at 55.3 million tons and spring grain production at 134.7 million tons. The winter grain production estimate is down from 1985's estimate of 60.4 million tons primarily because of a shortfall in seeded area last fall. Spring grain production is forecast to increase this year mainly because of expected higher area planted. The Soviets have not provided grain production data since 1980.

So far this year's early spring has been beneficial to Soviet grain farmers. As of May 5, the Soviets had seeded 33.8 million hectares of small grains and pulses, 40 percent of estimated spring small grain area. As of May 5, corn planting had been completed on 4 million hectares, compared to 2.4 million the same time in 1985, because of better sowing conditions.

Above-normal April precipitation covered winter grain areas that extend northward from the Crimea, through the northeastern Ukraine and Black Soils Region, into the Central Region and Volga Vyatsk. The rain in these areas benefited winter grains and provided adequate topsoil moisture conditions for spring crop emergence and early growth. Temperatures during April were above normal and examination of historical April temperature data for various locations in European USSR reveals that this April was the warmest since 1983. April's unseasonably warm weather accelerated winter grain growth and increased crop moisture demands. April precipitation was much below normal in winter grain areas in the extreme eastern Ukraine, North Caucasus, eastern Black Soils Region, and the Volga. As a result, the crop had to rely on soil moisture supplies to meet crop water requirements. Soil moisture was reduced in these areas and timely rains will be needed during the remainder of the growing season to ensure favorable yield prospects for both winter and spring grains.

The supply/use projections contained in this report have not been adjusted to reflect the possible impacts of the Soviet nuclear accident at Chernobyl because of a lack of specific information. These projections, are subject to modification as more precise information becomes available concerning the location, intensity, and decay life of the radioactive contamination associated with the incident.

In spring grain areas east of the Urals, planting normally begins around mid-May. Winter precipitation over these areas was near to above normal. However, a mild, dry April favored early season fieldwork.

During the past several days, widespread beneficial showers covered winter grains from the northern North Caucasus through the Volga Valley. However, the weather turned sharply cooler in these areas and on May 6-7, nighttime low temperatures at several locations dropped to below freezing. Winter wheat is mostly in the late vegetative/stem extension stage.

Grain Disappearance Holds at Recent Levels

Total USSR grain supplies for the 1986/87 marketing year are projected at around 220 million tons, including a 190 million ton crop and imports of 30 million. The Soviet Union is estimated to have added around 10 million tons to stocks over the past 3 years.

In a typical year, the USSR crop production estimate is discounted by around 10 percent as an allowance for post-harvest losses, including in transport and storage losses and dockage and waste. Consequently, only around 200 million tons of the 1986/87 grain supplies will be available for utilization or addition to stocks. Domestic grain utilization in 1986/87 is expected to total around 200 million, excluding the allowance for dockage and waste. Seed, food and industrial uses are projected to account for around 80 million tons of disappearance, unchanged from the level of recent years. Domestic feed use of grain apparently has plateaued at around 120 million tons. Grain used for feed continues to run below the peak levels of the late 1970's despite continued growth in the USSR livestock sector. A series of large forage crops, improved roughage quality and the campaign to reduce livestock's dependence on grain in feed rations likely has contributed to this apparent flattening out in grain-for-feed requirements.

Grain Imports Projected To Increase Only slightly

More than the usual amount of uncertainty surrounds this year's early-season estimate of USSR grain imports. The second half of the 1985/86 marketing year witnessed a significant slowdown in USSR's grain buying activity and so far buying for 1986/87 delivery appears to be minimal. Expectations of lower world grain prices this summer and fall, as a result of the new U.S. farm legislation, may be encouraging the USSR to delay late-season grain purchases as much as possible. Lower revenues from oil exports, a major source of foreign exchange, may be reflected in reduced USSR expenditures on imports, particularly for grain. The recent nuclear accident creates additional uncertainty about the level of USSR grain requirements for the 1986/87 marketing year.

USSR grain imports for the 1986/87 marketing year are projected at 30 million tons, up slightly from the year-earlier level but well below the 1980/81-1984/85 average import level of around 40 million tons. During this period, USSR estimated grain outturn averaged close to 180 million tons.

The Soviet Union currently has grain trading agreements that cover annual trade of around 20 million tons. However, based on recent shortfalls in purchases, the USSR may be de-emphasizing the importance of agreements in meeting annual grain import requirements.

Except for the record level of wheat imports in 1984/85, USSR wheat imports appear to have stabilized in the area of 20 million tons. As 1986 crop prospects are not significantly different from a year ago, 1986/87 imports are projected at 16 million tons, unchanged from the year-earlier level but somewhat below the average of recent years.

In recent years, USSR coarse grain imports have shown much more volatility than wheat trade. Imports reached 25.5 million tons in 1981/82, only to plummet the next year to around 11 million, apparently the result of a much improved 1982 crop. A reduced 1984 crop caused another surge in imports, to a record 26.9 million tons. However, as the following year's crop outturn was up, imports in 1985/86 dropped sharply and are currently projected at 12 million tons.

With the 1986 coarse grain crop estimated at 98 million tons, the second largest crop since 1978, imports are expected to continue well short of recent highs. At 13 million tons, 1986/87 imports would be up slightly from the 1985/86 level but less than half the record 1984/85 total. The U.S. share of the USSR coarse grain market has averaged around 50 percent in recent years and should hold or even improve in 1986/87 given the new U.S. farm legislation and expected lower corn prices.

Soviet Livestock Numbers Again at Record

During March, Soviet livestock inventories on state and collective farms continued their recovery. As of April 1, inventories of cattle, hogs, and poultry were all at record levels. Cow and sheep and goat numbers remained below the record. Expansion in the number of cattle other than cows during March was slightly higher than average for recent years.

USSR: Livestock Inventories on State and Collective Farms
April 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|------------------|-------|-------|-------|-------|-------|
| --Million Head-- | | | | | |
| Cattle, | 92.6 | 93.8 | 96.0 | 96.7 | 97.1 |
| of which cows | 29.8 | 29.7 | 29.7 | 29.6 | 29.2 |
| Hogs | 54.1 | 56.8 | 58.6 | 57.6 | 58.8 |
| Sheep and goats | 135.1 | 133.9 | 136.7 | 132.1 | 132.6 |
| Poultry | 706.9 | 733.3 | 746.0 | 756.2 | 779.6 |

Import Estimate for 1985/86 Reduced

Soviet grain buying activity continues to fall short of earlier expectations. Total coarse grain purchases from all origins as of early May are estimated at only around 11 million tons. Although there have been recent purchases of U.S. and Argentine corn and EC barley, the continued absence of large Argentine coarse grain sales has prompted a 1-million-ton reduction in the estimate of 1985/86 coarse grain imports to 12 million tons. In addition, a combination of

slower than expected shipments by some of the major suppliers and a shortfall in expected purchases has prompted a 1-million-ton reduction in the estimate of USSR wheat imports to 16 million tons. These changes have been accommodated by reducing the estimate of the stock change for 1985/86. No adjustments were made in utilization estimates.

Early Forage Outlook Good

Early-season prospects for the 1986 feed harvest are good. Last year's roughage crop, despite being a record, was delayed by a late spring. The more normal spring this year, combined with likely increased use of fertilizers and plant protectants on roughage crop fields in 1986, could result in larger production in 1986. Barring significant summer drought as occurred in 1981 and 1984, total feed supplies for 1986/87 could increase by an amount comparable to that achieved in 1985/86--or by roughly 2-3 percent.

Reduced Reliance on Grain Feeding

The USSR has succeeded since the late 1970's in reducing the share of grain in animal rations. Between 1979/80 and 1985/86 supplies of succulent and coarse feeds increased an estimated 27 percent, while concentrate feeds--primarily grain--remained unchanged. In addition, the quality of Soviet coarse and succulent feeds has improved over the period. The improvements in nongrain feed supplies were achieved through large investments in machinery and facilities for harvesting, handling, and storing feeds. In addition, roughage crops have received more fertilizer in the last few years, and a large share of newly introduced irrigated and drained lands continue to be devoted to roughage crops.

The larger quantity and improved quality of roughages allowed a reduction in concentrate feeding to cattle. Since 1982, the amount of concentrates expended per unit of liveweight grain for cattle in the socialized sector declined by more than 25 percent. The substitution of roughages for concentrates in cattle rations has held back improvement in feed conversion efficiency and average daily weight gain, two important indicators of productivity. Soviet feed conversion ratios remain high in comparison with those of most industrialized nations and generally exceed U.S. levels by roughly 40 percent. Soviet planners continue to stress the need to reduce the amount of feed expended per unit of production if medium term goals in the livestock sector are to be attained.

USSR feed-conversion coefficients
(kilogram of oat-unit equivalent/kilogram of output)

| Product | 1970 | 1980 | 1982 | 1983 | 1984 |
|-------------|------|------|------|------|------|
| Beef | 11.5 | 13.4 | 13.4 | 13.2 | 13.5 |
| Pork | 9.2 | 9.2 | 9.2 | 8.8 | 8.8 |
| Milk | 1.4 | 1.5 | 1.6 | 1.6 | 1.6 |
| Broilers 1/ | 4.6 | 4.3 | 4.0 | 4.1 | N/A |
| Eggs 1/ | 2.8 | 2.0 | 2.0 | 1.9 | N/A |

N/A = Not available. 1/ Ptitseprom system (state poultry industry) only.
Eggs--oat units per 10.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1984 (Preliminary), 1985 (Estimate)
and 1986 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production 1/ (Million) (Metric Tons) |
|-------------------------|----------------------------|---|---|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Preliminary) | 51.1 | 1.43 | 73.0 |
| 1985 (Estimate) | 50.3 | 1.65 | 83.0 |
| 1986 (Forecast) | 49.0 | 1.63 | 80.0 |
| <u>Coarse Grains 2/</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Preliminary) | 61.2 | 1.62 | 99.0 |
| 1984 (Preliminary) | 59.2 | 1.45 | 86.0 |
| 1985 (Estimate) | 58.5 | 1.61 | 94.0 |
| 1986 (Forecast) | 59.5 | 1.64 | 98.0 |
| <u>Total Grain 3/</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Preliminary) | 119.6 | 1.42 | 170.0 |
| 1985 (Estimate) | 117.9 | 1.61 | 190.0 |
| 1986 (Forecast) | 118.0 | 1.61 | 190.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

| Year | Production | Trade (Jul/Jun) | | Exports | Availability 1/ | | Total 1/ | | Seed | Industrial | Food | Dockage/ | | Feed | Stock Change 3/ July/June |
|-------------------|------------|-----------------|-----------|---------|-----------------|-----------------------|-----------------------|----------|------|------------|------|----------|-----|------|------------------------------|
| | | Imports | July/June | | July/June | (Million Metric Tons) | (Million Metric Tons) | Waste 2/ | | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | Total Grains 4/ | | 3 | 45 | 28 | 3 | 45 | 14 | 89 | -14 | |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 180 | 221 | 3 | 45 | 29 | 3 | 45 | 31 | 112 | +11 | |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 28 | 4 | 45 | 29 | 122 | -16 | |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 4 | 46 | 22 | 125 | +19 | |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 28 | 4 | 46 | 22 | 123 | -13 | |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 27 | 4 | 47 | 28 | 119 | -2 | |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 27 | 4 | 47 | 16 | 116 | -4 | |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 27 | 4 | 47 | 18 | 117 | -1 | |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | 222 | 219 | 27 | 4 | 47 | 27 | 4 | 47 | 21 | 120 | +3 | |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | 224 | 218 | 27 | 4 | 47 | 27 | 4 | 47 | 19 | 121 | +6 | |
| 1985/86 5/ 6/ | 190 | 29.0 | 1.0 | 218 | 218 | 27 | 4 | 48 | 27 | 4 | 48 | 18 | 121 | 0 | |
| Projected 1986/87 | 190 | 30.0 | 1.0 | 219 | 219 | 27 | 4 | 48 | 27 | 4 | 48 | 19 | 121 | 0 | |
| Wheat | | | | | | | | | | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 15 | 1 | 35 | 7 | 30 | -11 | |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 15 | 1 | 35 | 14 | 28 | +8 | |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 15 | 1 | 35 | 14 | 44 | -10 | |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 1 | 35 | 14 | 43 | +18 | |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 15 | 1 | 35 | 11 | 53 | -13 | |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 1 | 36 | 15 | 48 | -1 | |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 15 | 1 | 36 | 8 | 42 | -3 | |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 15 | 1 | 36 | 9 | 45 | 0 | |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | 99 | 97 | 15 | 1 | 36 | 15 | 1 | 36 | 9 | 36 | +2 | |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | 100 | 96 | 15 | 1 | 36 | 15 | 1 | 36 | 8 | 36 | +4 | |
| 1985/86 5/ 6/ | 83 | 16.0 | 1.0 | 98 | 98 | 15 | 1 | 37 | 15 | 1 | 37 | 8 | 37 | 0 | |
| Projected 1986/87 | 80 | 16.0 | 1.0 | 95 | 95 | 15 | 1 | 37 | 15 | 1 | 37 | 8 | 34 | 0 | |
| Coarse Grains | | | | | | | | | | | | | | | |
| 1975/76 | 66 | 15.6 | — | 81 | 84 | 12 | 2 | 7 | 12 | 2 | 7 | 7 | 56 | -3 | |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 12 | 3 | 7 | 16 | 78 | +3 | |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 11 | 3 | 7 | 14 | 74 | -5 | |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 12 | 3 | 7 | 13 | 79 | +1 | |
| 1979/80 | 81 | 18.4 | — | 100 | 100 | 12 | 3 | 7 | 12 | 3 | 7 | 10 | 68 | 0 | |
| 1980/81 5/ | 81 | 18.0 | — | 99 | 100 | 11 | 3 | 7 | 11 | 3 | 7 | 12 | 67 | -1 | |
| 1981/82 5/ 6/ | 72 | 25.5 | — | 98 | 99 | 11 | 3 | 7 | 11 | 3 | 7 | 7 | 71 | -1 | |
| 1982/83 5/ 6/ | 86 | 11.3 | — | 97 | 98 | 11 | 3 | 7 | 11 | 3 | 7 | 9 | 68 | -1 | |
| 1983/84 5/ 6/ | 99 | 11.5 | — | 110 | 109 | 11 | 3 | 7 | 11 | 3 | 7 | 11 | 77 | +1 | |
| 1984/85 5/ 6/ | 86 | 26.9 | — | 113 | 111 | 11 | 3 | 7 | 11 | 3 | 7 | 10 | 80 | +2 | |
| 1985/86 5/ 6/ | 94 | 12.0 | — | 106 | 106 | 11 | 3 | 7 | 11 | 3 | 7 | 9 | 76 | 0 | |
| Projected 1986/87 | 98 | 13.0 | — | 111 | 111 | 11 | 3 | 7 | 11 | 3 | 7 | 10 | 80 | 0 | |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|--------------|-------|--------|-----------|----------|-----------|-----------|----------|
| July 1983 | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 | 933 | 3,641 | |
| June | 255 | 1,124 | --- | 155 | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 845 | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 59 | 286 | 2,143 | |
| August | 1,231 | 1,408 | 115 | 444 | 330 | 3,528 | |
| September | 2,172 | 1,254 | 132 | 943 | 293 | 4,794 | |
| July-Sept | 3,662 | 4,143 | 305 | 1,446 | 909 | 10,465 | 11,300 |
| October | 2,320 | 809 | 152 | 966 | 302 | 4,549 | |
| November | 3,014 | 961 | 244 | 840 | 99 | 5,158 | |
| December | 3,535 | 96 | 100 | 512 | 230 | 4,473 | |
| Oct-Dec | 8,869 | 1,866 | 496 | 2,318 | 631 | 14,180 | 14,800 |
| January 1985 | 2,218 | 98 | 154 | 599 | 1,082 | 4,151 | |
| February | 2,196 | --- | 215 | 572 | 1,248 | 4,231 | |
| March | 2,023 | 17 | 667 | 934 | 926 | 4,567 | |
| Jan-March | 6,437 | 115 | 1,036 | 2,105 | 3,256 | 12,949 | 14,000 |
| April | 2,016 | 388 | 716 | 930 | 1,225 | 5,275 | |
| May | 1,566 | 1,237 | 468 | 921 | 1,368 | 5,560 | |
| June | 106 | 481 | 211 | 1,116 | 580 | 2,494 | |
| April-June | 3,688 | 2,106 | 1,395 | 2,967 | 3,173 | 13,329 | 14,700 |
| July | 8 | --- | 25 | 208 3/ | 443 | 684 | |
| August | --- | --- | --- | 152 3/ | 281 | 433 | |
| September | --- | 1,384 | --- | 75 3/ | 59 | 1,518 | |
| July-Sept | 8 | 1,384 | 25 | 435 3/ | 783 | 2,635 | 4,200 |
| October | 411 | 1,057 | 89 | 200 3/ | 316 | 2,073 | |
| November | 2,487 | 900 | 212 | 600 3/ | 423 | 4,622 | |
| December | 1,337 | 750 | 101 | 1,100 3/ | 57 | 3,345 | |
| Oct-Dec | 4,235 | 2,707 | 402 | 1,900 3/ | 796 | 10,040 | 11,500 |
| January 1986 | 980 | 171 | 450 | 1,150 3/ | 15 | 2,766 | |
| February | 956 | --- | 494 | 1,100 3/ | --- | 2,550 | |
| March | 71 | --- | 850 | 950 3/ | --- | 1,871 | |
| Jan-March | 2,007 | 171 | 1,794 | 3,200 | 15 | 7,187 | 7,600 |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

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Grains

SG-6-86
June 1986

USSR Grain Situation and Outlook

The outlook for USSR grain supplies and disappearance in 1986/87 has changed over the past month. Continued dry weather over important grain areas of the European USSR has reduced crop prospects. Both winter and spring grain yields have suffered. With smaller crop prospects, the estimate of USSR grain imports was increased and the estimate of grain used for feed reduced.

1986 Crop Estimate Reduced

The estimate of the 1986 Soviet grain crop was reduced 5 million tons to 185 million tons this month. Hot, dry weather in Moldavia, parts of the Ukraine, the Black Soils, and the Volga Valley reduced yield potential for the grain crops. Winter wheat production was reduced 2 million tons to 38 million. Spring barley production was lowered 2 million tons to 44 million. Spring wheat output was reduced 1 million tons to 39 million. No area changes were made.

The seeding progress report indicated that as of June 2 all spring crops had been sown on 136.3 million hectares compared to 133.7 million hectares in 1985. This was reportedly 96 percent of planned sown area. The Soviets have provided no data on grain sowing progress since mid-May. Typically grain planting is completed by early June.

Weather and Crop Prospects

May precipitation was below normal throughout most of European USSR, and crops had to rely on available soil moisture for continued growth. Less than 25 mm of rain fell northward from Moldavia and parts of the southern Ukraine, through the west-central Ukraine, into the Central Region. The dry weather in these areas has persisted since March, creating unfavorable conditions for crop growth, especially in the Ukraine for winter wheat, which was in the highly moisture sensitive heading stage and spring barley approaching the heading stage. Crop areas which received above-normal rainfall were those in the western and southern North Caucasus where timely showers benefited winter wheat advancing through reproduction. Temperatures during May rose from below-normal early in the month to above-normal by month's end. In late May and early June, unfavorable hot, dry weather covered the northern North Caucasus, eastern Black Soils Region, and the Volga, stressing winter wheat entering the highly weather sensitive reproductive stage and creating unfavorable conditions for spring grains emergence and early growth. Daytime highs in these areas reached 32 degrees C for nearly a week with nighttime lows remaining around 18 degrees C. Winds in these areas were light. Recently, temperatures moderated over eastern and southern crop areas of European USSR, lowering the heat stress and light scattered showers fell over some areas. Hot dry weather returned to eastern crop areas of European USSR on June 10 with localized areas experiencing winds around 10 knots.

In crop areas east of the Ural mountains, spring grain sowing took place during May under mostly favorable weather conditions. Above-normal precipitation in most areas provided highly favorable topsoil moisture needed for uniform seed emergence and early plant establishment. Recent widespread showers occurred over northern and eastern areas, where temperatures dropped to below normal.

Import Estimate Increased; 1986/87 Buying Activity Slow

In spite of deteriorating crop prospects, Soviet grain buying activity for the 1986/87 marketing year has been slow to develop with purchases to date thought to total less than 2 million tons. This compares with projected 1986/87 imports of 32 million tons, including 17 million tons of wheat, 14 million tons of coarse grains, and 1 million tons of rice, pulses, and miscellaneous grains. The estimate of wheat and coarse grain imports have been increased by a million tons each from last month's projection.

In recent years, USSR grain imports during the July-September quarter are estimated to have ranged from a low of 3.5 million tons to a high of 11.2 million. If past trends are any indication, when USSR July-June grain imports total around 30 million tons, imports in the first quarter average 4 to 5 million tons. Given the 1986/87 import projection, it appears that the USSR still has significant grain to buy for July-September 1986 delivery. However, the Soviets may continue to delay purchases in anticipation of further international grain market adjustments to the new U.S. farm programs.

Wheat Supplies Off, Coarse Grain Supplies Large

Wheat supplies in 1986/87 are projected to total only around 93 million tons, the smallest in 11 years. Despite prospects for a reduced wheat harvest, the USSR is not expected to significantly increase wheat imports. Reflecting the smaller supplies, an estimated 33 million tons of wheat will be fed, the least since 1976/77. Coarse grain supplies in 1986/87 are estimated at 110 million tons, buoyed by the prospects of another large crop. Imports, estimated at 14 million tons, are expected to increase slightly from the 1985/86 level. Reflecting the large supplies, domestic use is expected to climb to 110 million tons up from the year earlier level but the same as in the two preceding years.

Domestic Use Estimate Reduced

The estimate of domestic grain use in 1986/87 was reduced by 3 million tons from last month to 216 million tons. Because of a large decline in expected foreign exchange availability this year, the Soviets are not expected to cover production shortfalls entirely through imports, but instead marginally reduce grain utilization. Soviet meat production targets in 1986 call for a modest 1 percent increase. A small grain crop in 1986 could result in some shift in the projected expansion in the livestock sector into 1987. Feed use, the single largest disappearance item is projected at 119 million tons, 2 million tons below last year's level. Grain for seed, industry and food is projected to continue at around 80 million tons. The allowance for dockage and waste has been projected at 18 million tons. With grain supplies and projected use in balance, the USSR is not expected to add to grain stocks in 1986/87.

Import Estimate for 1985/86 Unchanged

During the past month, USSR grain buyers added modestly to purchases for delivery in 1985/86. The United States and Argentina indicated some corn sales while the EC continued to report small sales of both wheat and barley. With total commitments placed at over 27 million tons, the USSR appears to have basically covered 1985/86 import requirements.

Background on Chernobyl Nuclear Accident

As a result of the explosion at Chernobyl in April, a significant amount of radiation was released within the first 24 hours. Winds at the time were about 5 knots flowing toward the north-northwest. The Soviets reported a 30-kilometer radius around the site had high radioactivity. Since the accident there has been little or no agriculture activity within this zone. The area around and northwest of the reactor is not a prime agricultural area. In the exposed areas, the greatest impact on Soviet agriculture appears to be in the livestock sector (primarily milk and forage used to feed livestock) and vegetable and fruit production. The Soviets have indicated that slaughtering of livestock near the reactor has already taken place and monitoring of dairy products will continue for the near future.

U.S. - USSR Consultations Scheduled

The USSR and the United States were scheduled to hold another session of the regular semi-annual consultations called for under the U.S.-USSR long-term grain agreement on June 9-10 in Moscow. The agenda will be the same as that followed in previous consultations.

Record Cattle and Poultry Inventories

Livestock inventories on state and collective farms continued to recover because of good over-wintering conditions last winter and early use of pasture. Inventories of cattle and poultry remained at record levels during April. Hog and sheep and goat numbers remain below the record but are larger than those in the comparable period in 1985.

Livestock Inventories on State and Collective Farms May 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|------------------|-------|-------|-------|-------|-------|
| --million head-- | | | | | |
| Cattle | 94.5 | 95.9 | 97.9 | 98.3 | 98.9 |
| of which cows | 29.9 | 29.9 | 29.8 | 29.6 | 29.3 |
| Hogs | 55.0 | 57.4 | 59.2 | 57.4 | 58.9 |
| Sheep and goats | 146.5 | 147.7 | 148.7 | 143.6 | 146.5 |
| Poultry | 746.8 | 768.3 | 781.0 | 787.8 | 802.2 |

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1984 (Preliminary), 1985 (Estimate)
and 1986 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production ^{1/} (Million) (Metric Tons) |
|------------------------------------|----------------------------|---|--|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Preliminary) | 51.1 | 1.43 | 73.0 |
| 1985 (Estimate) | 50.3 | 1.65 | 83.0 |
| 1986 (Forecast) | 49.0 | 1.57 | 77.0 |
| <u>Coarse Grains ^{2/}</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Preliminary) | 61.2 | 1.62 | 99.0 |
| 1984 (Preliminary) | 59.2 | 1.45 | 86.0 |
| 1985 (Estimate) | 58.5 | 1.61 | 94.0 |
| 1986 (Forecast) | 59.5 | 1.61 | 96.0 |
| <u>Total Grain ^{3/}</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Preliminary) | 119.6 | 1.42 | 170.0 |
| 1985 (Estimate) | 117.9 | 1.61 | 190.0 |
| 1986 (Forecast) | 118.0 | 1.57 | 185.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

| Year | Production | Trade (Jul/Jun) | Imports | Exports | Availability 1/ | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|-------------------|------------|-----------------|---------|---------|-----------------|-----------------------|------|------------|------|----------------------|------|------------------------------|
| | | | | | July/June | (Million Metric Tons) | | | | | | |
| | | | | | | Total Grains 4/ | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | | 213 | 228 | 4 | 4 | 28 | 29 | 122 | -15 |
| 1978/79 | 237 | 15.6 | 2.8 | | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | | 222 | 219 | 27 | 4 | 47 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | | 224 | 218 | 27 | 4 | 47 | 19 | 121 | +6 |
| 1985/86 5/ 6/ | 130 | 29.0 | 1.0 | | 218 | 218 | 27 | 4 | 48 | 18 | 121 | 0 |
| Projected 1986/87 | 185 | 32.0 | 1.0 | | 216 | 216 | 27 | 4 | 48 | 18 | 119 | 0 |
| | | | | | | Wheat | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | | 99 | 97 | 15 | 1 | 36 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | | 100 | 96 | 15 | 1 | 36 | 8 | 36 | +4 |
| 1985/86 5/ 6/ | 83 | 16.0 | 1.0 | | 98 | 98 | 15 | 1 | 37 | 8 | 37 | 0 |
| Projected 1986/87 | 77 | 17.0 | 1.0 | | 93 | 93 | 15 | 1 | 37 | 7 | 33 | 0 |
| | | | | | | Coarse Grains | | | | | | |
| 1975/76 | 66 | 15.6 | -- | | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 99 | 11.5 | -- | | 110 | 109 | 11 | 3 | 7 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 86 | 26.9 | -- | | 113 | 111 | 11 | 3 | 7 | 10 | 80 | +2 |
| 1985/86 5/ 6/ | 94 | 12.0 | -- | | 106 | 106 | 11 | 3 | 7 | 9 | 76 | 0 |
| Projected 1986/87 | 96 | 14.0 | -- | | 110 | 110 | 11 | 3 | 7 | 10 | 79 | 0 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

USSR Total Grain Imports ^{1/}
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total ^{2/} |
|--------------|-------|--------|-----------|---------------------|-----------|-----------|---------------------|
| July 1983 | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 263 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 | 933 | 3,641 | |
| June | 255 | 1,124 | --- | 155 | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 845 | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 59 | 286 | 2,143 | |
| August | 1,231 | 1,408 | 115 | 444 | 330 | 3,528 | |
| September | 2,172 | 1,254 | 132 | 943 | 293 | 4,794 | |
| July-Sept | 3,662 | 4,143 | 305 | 1,446 | 909 | 10,465 | 11,300 |
| October | 2,320 | 809 | 152 | 966 | 302 | 4,549 | |
| November | 3,014 | 961 | 244 | 840 | 99 | 5,158 | |
| December | 3,535 | 96 | 100 | 512 | 230 | 4,473 | |
| Oct-Dec | 8,869 | 1,866 | 496 | 2,318 | 631 | 14,180 | 14,800 |
| January 1985 | 2,218 | 98 | 154 | 599 | 1,082 | 4,151 | |
| February | 2,196 | --- | 215 | 572 | 1,248 | 4,231 | |
| March | 2,023 | 17 | 667 | 934 | 926 | 4,567 | |
| Jan-March | 6,437 | 115 | 1,036 | 2,105 | 3,256 | 12,949 | 14,000 |
| April | 2,016 | 388 | 716 | 930 | 1,225 | 5,275 | |
| May | 1,566 | 1,237 | 468 | 921 | 1,368 | 5,560 | |
| June | 106 | 481 | 211 | 1,116 | 580 | 2,494 | |
| April-June | 3,688 | 2,106 | 1,395 | 2,967 | 3,173 | 13,329 | 14,700 |
| July | 8 | --- | 25 | 208 ^{3/} | 443 | 684 | |
| August | --- | --- | --- | 152 ^{3/} | 281 | 433 | |
| September | --- | 1,384 | --- | 75 ^{3/} | 59 | 1,518 | |
| July-Sept | 8 | 1,384 | 25 | 435 ^{3/} | 783 | 2,635 | 4,200 |
| October | 411 | 1,057 | 89 | 200 ^{3/} | 316 | 2,073 | |
| November | 2,487 | 900 | 212 | 600 ^{3/} | 423 | 4,622 | |
| December | 1,337 | 750 | 101 | 1,100 ^{3/} | 57 | 3,345 | |
| Oct-Dec | 4,235 | 2,707 | 402 | 1,900 ^{3/} | 796 | 10,040 | 11,500 |
| January 1986 | 980 | 171 | 450 | 1,160 ^{3/} | 15 | 2,776 | |
| February | 956 | --- | 494 | 1,100 ^{3/} | --- | 2,550 | |
| March | 71 | --- | 850 | 950 ^{3/} | --- | 1,871 | |
| Jan-March | 2,007 | 171 | 1,794 | 3,210 ^{3/} | 15 | 7,197 | 7,600 |
| April | --- | --- | N/A | 600 ^{3/} | --- | 600 | |

^{1/} Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

^{2/} Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

^{3/} Preliminary

N/A Not Available

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USSR Grain Situation and Outlook

Crop prospects in the European USSR continued to deteriorate this past month prompting an additional 5 million ton reduction in the 1986 crop estimate. As a result, the Soviets are expected to increase imports modestly as well as draw on stocks accumulated since 1983/84.

1986 USSR Crop Reduced

The 1986 USSR grain crop is estimated at 180 million metric tons, down 5 million from the June estimate. Hot dry weather in much of the European USSR throughout June caused yield reductions for barley, winter wheat and corn. The reduction includes 1 million tons of wheat, now estimated at 76 million tons, and 5 million tons of coarse grains estimated at 91 million tons. Miscellaneous grain production was increased 1 million tons to 13 million tons as the result of adjustments in yield and area. The total grain area estimate remains at 118 million hectares. However, the estimate of area planted to spring barley has been reduced while the area in pulses was increased. The new production estimate includes 51.7 million tons of winter grains down 1.6 million from a month ago and 128.3 million tons of spring grains down 3.4 million tons.

The 1986 grain harvest progress is ahead of the pace of the last two years. As of July 10, small grains and pulses had been cut on 10.4 million hectares. The good pace reflects an advanced crop and favorable harvesting conditions.

Weather and Crop Prospects

In the European USSR, the hot, dry weather which covered the Volga, eastern Black Soils Region, and the northern North Caucasus in late May and early June spread westward into the Ukraine. Daytime highs of around 32 degrees C in the southern and eastern Ukraine were accompanied by moderate winds (around 20 knots). The hot, dry weather stressed winter wheat in the filling stage, spring grains in the flowering and grain formation stages, and corn in the vegetative stage. Temperatures fell below normal around June 24, alleviating heat stress. Light showers began around June 21 with more substantial rainfall stabilizing crop conditions during late June. Crop areas in the western Volga and the southern Ukraine were mostly dry during June. In early July, hot weather returned to eastern European USSR crop areas, continuing until July 10, when an eastward moving cold front brought cooler weather and light showers.

In the New Lands, weather conditions have been mostly favorable for spring grains. However, the weather turned unseasonably dry after mid-June which reduced soil moisture. A brief period of hot weather in early July covered spring grains in Kazakhstan and parts of Western Siberia. Recently, cooler weather returned to these areas accompanied by light showers. Spring grains in the south are in the heading stage while further north in the Urals and Siberia, the crop is jointing. Cool weather and timely rains are needed in upcoming weeks, to ensure favorable crop prospects.

USSR Grain Purchases Modest

USSR grain buying activity has been slow to develop for the 1986/87 marketing year. A number of factors may be contributing to this, including USSR expectations of lower prices as the 1986 world grain harvest accelerates and reduced USSR foreign exchange earnings. Recent reports have indicated some possible EC wheat sales, however, reports of other sales have been scarce. Sales of Argentine coarse grains to the USSR against this year's agreement continue to run well short of expectations. There have been no recent reports of Canadian sales although Canada is often a major grain supplier to the USSR for the July-December period. In recent years, shipments for this period have averaged nearly 4 million tons. As August marks the start of a new 5-year grain agreement between Canada and the USSR, it is quite likely that some sales have already been negotiated.

Import Estimate Increased

The estimate of USSR grain imports for the 1986/87 marketing year has been increased by 2 million tons to 34 million, including 18 million wheat, 15 million coarse grains and one million miscellaneous grains, rice, and pulses. The estimate of coarse grain imports of 15 million tons is up from the year earlier level, but still well below the record 1984/85 total. Projected corn imports in 1986/87 are expected to increase to over 11 million tons, reflecting reduced sorghum export availability particularly in Argentina and the sharply lower level of world corn prices. USSR barley imports, principally from Canada and the EC are expected to total around 3 million tons. The level of USSR barley imports will again be dependent upon the price of barley relative to corn in the world market.

Import Estimate for 1985/86 Holds

The estimate of wheat and coarse grain imports is unchanged from a month ago. Grain shipments from the major suppliers accelerated modestly in May and June after slumping in April to the lowest level since last summer. A pick-up in Canadian wheat shipments offset a decline elsewhere. May and June witnessed a recovery in coarse grain shipments from the early spring pace as the USSR lifted corn from the United States and Argentina.

Domestic Use Projected to Decline from Year Ago

Total domestic use is projected to decline slightly in 1986/87 from the level of the past three year's as the USSR continues its efforts to reduce dependence on grain in livestock rations. A series of good forage crops has also helped the Soviets limit grain for feed expenditures while expanding livestock inventories. In order to meet 1986/87's grain requirements, the USSR is also expected to draw modestly from stocks accumulated since 1983/84.

U.S. and Soviet Officials Discuss Grain Trade

On June 10, U.S. and Soviet officials concluded two days of talks in Moscow on grain supplies and trade prospects for the two countries. These meetings were a continuation of the regular series of semi-annual consultations called for under the current U.S.-USSR grain agreement which was signed in 1983 and extends through September 30, 1988.

The sessions covered the usual topics, primarily consisting of an exchange of views on the situation and outlook for grains and a review of actual trade taking place under the agreement. During the review of purchases and shipments, a major topic was the status of the agreement requirement that at least 4 million metric tons of U.S. wheat must be purchased by the USSR for shipment during each October-September year. Last year, only 2.9 million metric tons were traded; as a result, 1984/85 was the first year of any shortfall since the inception of the original five-year agreement in October 1976.

Currently, with two-thirds of the 1985/86 marketing year passed, shipments have totalled only 153,000 tons and a further 3.85 million metric tons remain to be purchased for shipment before September 30. Discussions of this problem produced no assurance that this year's remaining balance would be taken, although the Soviet side indicated the possibility of making some additional purchases this summer after a better assessment of this year's Soviet grain output.

The current U.S.-USSR grain agreement calls for minimum annual shipments of 9 million metric tons, of which at least 4 million metric tons must be wheat and at least 4 million metric tons must be corn. The Soviets have the option of satisfying the remaining 1 million metric tons with either wheat, corn, soybeans and/or soybean meal, on the basis that every ton of soybeans and/or meal, up to a maximum of 500,000 tons, counts as two tons of grain. The agreement also specifies that the USSR may purchase up to 12 million metric tons of wheat and/or corn annually without prior consultations. Last October, the United States authorized the USSR to buy an additional 10 million metric tons this year.

Feed Harvest Fastest in Several Years, Procurements Slow

In comparison with the performance in the previous four years, the 1986 forage harvest has gotten off to a good start. As of June 23, 22.9 million hectares of sown and natural grasses had been cut, slightly more than the average of 20.7 million hectares for 1982/85. In comparison with the 1982-85 average, more hay and less haylage and grass meal had been produced thus far in 1986. The current forage harvest is lagging behind the early season record pace of 1983.

In early June, the Soviet press complained that fodder procurement is "slow" and "quality was poor". Reportedly, the nutrient value of the forage crop in parts of the eastern Ukraine, the Baltic, Belorussia, and the non-black soil zone of the RSFSR has deteriorated because farmers have delayed harvest until after flowering. The warm spring has caused fodder crops to mature earlier than average.

USSR: Harvest of Roughages as of June 23

| | 1982-85 avg. 1/ | 1983 | 1984 | 1985 | 1986 |
|------------------------------------|--------------------|-------|-------|-------|-------|
| --Million Hectares-- | | | | | |
| Sown and Natural Grasses cut | 20.7 | 24.3 | 20.8 | 19.7 | 22.9 |
| --Million Tons-- | | | | | |
| Hay | 11.0 | 16.9 | 9.6 | 9.4 | 15.0 |
| Haylage | 20.0 | 25.4 | 20.7 | 18.7 | 18.6 |
| Grass Meal | 1.5 | 2.0 | 1.5 | 1.2 | 1.3 |
| Total in oat unit equivalent 2/ | 13.01 | 17.92 | 12.62 | 11.60 | 14.17 |

1/ For 1982-85 data are interpolated.

2/ Using the following oat unit coefficients: hay, 0.45; haylage, 0.34; grass meal, 0.84.

Livestock Trends Stabilizing

During May there was little shift in the pattern of livestock inventories on state and collective farms. As of June 1, cattle and poultry numbers remained at record levels, while hog and sheep and goat inventories remained higher than the previous year's levels, but shy of record amounts. Cow numbers on state and collective farms are at the lowest level since the 1970's.

USSR: Livestock Inventories on State and Collective Farms,
May 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|------------------|-------|-------|-------|-------|-------|
| --Million Head-- | | | | | |
| Cattle | 95.4 | 96.8 | 98.7 | 98.9 | 99.6 |
| of which cows | 30.0 | 29.9 | 29.9 | 29.7 | 29.4 |
| Hogs | 55.8 | 58.6 | 60.1 | 57.8 | 59.5 |
| Sheep and goats | 146.4 | 148.2 | 148.6 | 143.5 | 146.8 |
| Poultry | 757.7 | 778.8 | 794.0 | 796.0 | 799.2 |

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1984 (Preliminary), 1985 (Estimate)
and 1986 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production 1/ (Million) (Metric Tons) |
|-------------------------|----------------------------|---|---|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
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| <u>Total Grain 3/</u> | | | |
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| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
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USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

| Year | Trade (Jul/Jun) | | Availability 1/ July/June | Total 1/ Metric Tons | | | | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|----------------------|-----------------|---------|------------------------------|-------------------------|------------|------|------|----------------------|------|------------------------------|
| | Imports | Exports | | Production | Industrial | Food | Seed | | | |
| 1975/76 | 26.1 | 0.7 | 166 | 140 | 3 | 45 | 28 | 14 | 89 | -14 |
| 1976/77 | 11.0 | 3.3 | 232 | 224 | 3 | 45 | 29 | 31 | 112 | +11 |
| 1977/78 | 18.9 | 2.3 | 213 | 196 | 4 | 45 | 28 | 29 | 122 | -16 |
| 1978/79 | 15.6 | 2.8 | 250 | 237 | 4 | 45 | 28 | 28 | 125 | +19 |
| 1979/80 | 31.0 | 0.8 | 209 | 179 | 4 | 46 | 28 | 22 | 123 | -13 |
| 1980/81 5/ | 34.8 | 0.5 | 223 | 189 | 4 | 47 | 27 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 46.0 | 0.5 | 206 | 160 | 4 | 47 | 27 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 32.5 | 0.5 | 212 | 180 | 4 | 47 | 27 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 32.9 | 0.5 | 222 | 190 | 4 | 47 | 27 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 55.5 | 1.0 | 224 | 170 | 4 | 47 | 27 | 19 | 121 | +6 |
| 1985/86 5/ 6/ | 29.0 | 1.0 | 218 | 190 | 4 | 48 | 27 | 18 | 121 | 0 |
| Projected 1986/87 | 34.0 | 1.0 | 213 | 180 | 4 | 48 | 27 | 18 | 119 | -3 |
| <u>Wheat</u> | | | | | | | | | | |
| 1975/76 | 10.1 | 0.5 | 76 | 66 | 1 | 35 | 15 | 7 | 30 | -11 |
| 1976/77 | 4.6 | 1.0 | 100 | 97 | 1 | 35 | 15 | 14 | 28 | +8 |
| 1977/78 | 6.6 | 1.0 | 98 | 92 | 1 | 35 | 15 | 14 | 44 | -10 |
| 1978/79 | 5.1 | 1.5 | 125 | 121 | 1 | 35 | 14 | 14 | 43 | +13 |
| 1979/80 | 12.0 | 0.5 | 102 | 90 | 1 | 35 | 15 | 11 | 53 | -13 |
| 1980/81 5/ | 16.0 | 0.5 | 114 | 98 | 1 | 36 | 15 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 19.5 | 0.5 | 99 | 80 | 1 | 36 | 15 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 20.2 | 0.5 | 106 | 86 | 1 | 36 | 15 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 20.5 | 0.5 | 99 | 79 | 1 | 36 | 15 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 28.1 | 1.0 | 100 | 73 | 1 | 36 | 15 | 8 | 36 | +4 |
| 1985/86 5/ 6/ | 16.0 | 1.0 | 98 | 83 | 1 | 37 | 15 | 8 | 37 | 0 |
| Projected 1986/87 | 18.0 | 1.0 | 93 | 76 | 1 | 37 | 15 | 7 | 35 | -2 |
| <u>Coarse Grains</u> | | | | | | | | | | |
| 1975/76 | 15.6 | -- | 81 | 66 | 2 | 7 | 12 | 7 | 56 | -3 |
| 1976/77 | 5.7 | 2.0 | 119 | 115 | 3 | 7 | 12 | 16 | 78 | +3 |
| 1977/78 | 11.7 | 1.0 | 103 | 93 | 3 | 7 | 11 | 14 | 74 | -5 |
| 1978/79 | 10.0 | 1.0 | 114 | 105 | 3 | 7 | 12 | 13 | 79 | +1 |
| 1979/80 | 18.4 | -- | 100 | 81 | 3 | 7 | 12 | 10 | 68 | 0 |
| 1980/81 5/ | 18.0 | -- | 99 | 81 | 3 | 7 | 11 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 25.5 | -- | 98 | 72 | 3 | 7 | 11 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 11.3 | -- | 97 | 86 | 3 | 7 | 11 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 11.5 | -- | 110 | 99 | 3 | 7 | 11 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 26.9 | -- | 113 | 86 | 3 | 7 | 11 | 10 | 80 | +2 |
| 1985/86 5/ 6/ | 12.0 | -- | 106 | 94 | 3 | 7 | 11 | 9 | 76 | 0 |
| Projected 1986/87 | 15.0 | -- | 106 | 91 | 3 | 7 | 11 | 10 | 76 | -1 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

USSR Total Grain Imports ^{1/}
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total ^{2/} |
|--------------|-------|--------|-----------|---------------------|-----------|-----------|---------------------|
| July 1983 | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 | 933 | 3,641 | |
| June | 255 | 1,124 | --- | 155 | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 845 | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 59 | 286 | 2,143 | |
| August | 1,231 | 1,408 | 115 | 444 | 330 | 3,528 | |
| September | 2,172 | 1,254 | 132 | 943 | 293 | 4,794 | |
| July-Sept | 3,662 | 4,143 | 305 | 1,446 | 909 | 10,465 | 11,300 |
| October | 2,320 | 809 | 152 | 966 | 302 | 4,549 | |
| November | 3,014 | 961 | 244 | 840 | 99 | 5,158 | |
| December | 3,535 | 96 | 100 | 512 | 230 | 4,473 | |
| Oct-Dec | 8,869 | 1,866 | 496 | 2,318 | 631 | 14,180 | 14,800 |
| January 1985 | 2,218 | 98 | 154 | 599 | 1,082 | 4,151 | |
| February | 2,196 | --- | 215 | 572 | 1,248 | 4,231 | |
| March | 2,023 | 17 | 667 | 934 | 926 | 4,567 | |
| Jan-March | 6,437 | 115 | 1,036 | 2,105 | 3,256 | 12,949 | 14,000 |
| April | 2,016 | 388 | 716 | 930 | 1,225 | 5,275 | |
| May | 1,566 | 1,237 | 468 | 921 | 1,368 | 5,560 | |
| June | 106 | 481 | 211 | 1,116 | 580 | 2,494 | |
| April-June | 3,688 | 2,106 | 1,395 | 2,967 | 3,173 | 13,329 | 14,700 |
| July | 8 | --- | 25 | 208 ^{3/} | 443 | 684 | |
| August | --- | --- | --- | 152 ^{3/} | 281 | 433 | |
| September | --- | 1,384 | --- | 75 ^{3/} | 59 | 1,518 | |
| July-Sept | 8 | 1,384 | 25 | 435 ^{3/} | 783 | 2,635 | 4,200 |
| October | 411 | 1,057 | 89 | 200 ^{3/} | 316 | 2,073 | |
| November | 2,487 | 900 | 212 | 485 ^{3/} | 423 | 4,507 | |
| December | 1,337 | 750 | 101 | 1,155 ^{3/} | 57 | 3,400 | |
| Oct-Dec | 4,235 | 2,707 | 402 | 1,840 ^{3/} | 796 | 9,980 | 11,500 |
| January 1986 | 980 | 171 | 450 | 1,160 ^{3/} | 15 | 2,776 | |
| February | 956 | --- | 494 | 1,100 ^{3/} | --- | 2,550 | |
| March | 71 | --- | 850 | 850 ^{3/} | --- | 1,771 | |
| Jan-March | 2,007 | 171 | 1,794 | 3,110 ^{3/} | 15 | 7,097 | 7,600 |
| April | --- | --- | 373 | 600 ^{3/} | --- | 973 | |
| May | 172 | 341 | 570 | 550 ^{3/} | 220 | 1,853 | |

^{1/} Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

^{2/} Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

^{3/} Preliminary

N/A Not Available

FAS, Grain and Feed Division
July 10, 1986

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Grains

SEP 3 '86

USSR Grain Situation and Outlook

SG-8-86

August 1986

CURRENT INFO RECORDS

Recent developments have increased the uncertainty surrounding the estimate of USSR grain imports for the 1986/87 marketing year. Some of these include:

- A recent announcement of a U.S. Export Enhancement Program for wheat to the USSR.
- Limited USSR grain purchases on the international market despite apparent significant import requirements this year.
- Deteriorating crop prospects -- the estimate of the 1986 harvest has been reduced to 175 million tons, down 5 million from a month ago and 15 million below the initial USDA projection made in May.
- Prospects for a large forage crop which may limit grain for feed requirements in the expanding livestock sector.

Grain Production Estimate Reduced

Soviet grain production is estimated at 175 million tons, down 5 million from the July estimate. The estimate was lowered because of both area and yield reductions. Area was reduced to 116.8 million hectares, reflecting newly released preliminary sown area numbers. The Soviet mid-year plan fulfillment report placed preliminary sown area at 118.1 million hectares. Final harvested area is usually 1-1.5 million hectares below the preliminary numbers. The corn area estimate was reduced by 700,000 hectares, spring barley by 300,000 hectares and spring wheat by 200,000 hectares.

Corn and spring barley yields were reduced this month as a result of dry weather in the Volga Valley, Ukraine, Black Soils and in southern and western Kazakhstan. The production estimate for corn was reduced by 3 million tons, and spring barley by 2 million tons. The reduced spring wheat area was offset by a slight increase in the yield estimate.

Harvest of small grains and pulses continues at a rapid pace, according to the report issued for August 4, when 41.1 million hectares had been cut and 40.5 million had been threshed. A year ago, when the season was delayed, only 33.6 million hectares had been cut by a comparable date; 83 percent of the area had been threshed.

USSR: Comparison of Official Preliminary and Final Grain Area Data
(1,000 Hectares)

| <u>Year</u> | <u>Preliminary 1/</u> | <u>Final 2/</u> | <u>Difference</u> |
|-------------|-----------------------|-----------------|-------------------|
| 1974 | 129,800 | 127,200 | 2,600 |
| 1975 | 131,000 | 127,900 | 3,100 |
| 1976 | 130,956 | 127,760 | 3,196 |
| 1977 | 131,484 | 130,344 | 1,140 |
| 1978 | 131,719 | 128,465 | 3,254 |
| 1979 | 130,158 | 126,351 | 3,807 |
| 1980 | 130,022 | 126,588 | 3,434 |
| 1981 | 126,399 | 125,559 | 840 |
| 1982 | 123,900 | 123,012 | 888 |
| 1983 | 122,500 | 120,809 | 1,691 |
| 1984 | N/A 3/ | 119,612 | N/A |
| 1985 | 119,400 | 117,939 | 1,461 |
| 1986 | 118,100 | --- | --- |

1/ As given in respective reports of mid-year plan fulfillment

2/ Vestnik Statistiki

3/ Not published

Weather Developments

In European USSR, July's weather continued unfavorably dry over crop areas in the southern Ukraine, parts of the eastern Ukraine and North Caucasus, the southern Black Soils, and the Volga. July's dry weather in these areas was unfavorable for corn advancing through reproduction, but favored small grains maturation and harvesting. Several days of hot weather (daytime highs around 32 degrees C) in the North Caucasus and southern Ukraine placed further stress on corn. Spring barley in the Volga Valley, eastern Black Soils and eastern Ukraine was stressed by dryness. On July 25, showers and cooler weather moved into these areas except the Volga and parts of the North Caucasus, and continued until early August, stabilizing conditions for corn. Above-normal July precipitation in the western Ukraine, Belorussia, the Baltic States, and parts of the Central Region favored spring grains in the filling stage. In early August, unseasonably warm, dry weather covered much of European USSR, promoting crop maturation and aiding harvest activity.

In crop areas east of the Ural mountains, near to above-normal precipitation benefited spring grains in central and northern crop areas. Historically, these areas account for about 50 percent of total spring wheat production. Southernmost crop areas were unfavorably dry, and periods of hot weather in both early and late July increased heat stress. Spring wheat in these areas historically account for about 10 percent of total spring wheat production. In early August, unseasonably cool, wet weather covered much of the region, benefiting grain filling in the central Urals and northern Kazakhstan, and flowering and grain formation in western and eastern Siberia.

U.S. Extends Export Enhancement Program to USSR

On August 1, the USDA announced that U.S. wheat would be made available to the Soviet Union at current world market prices in sufficient quantities to fulfill the terms of the U.S.-USSR Long Term Grain Agreement. The Soviets may buy up to 4 million tons of U.S. wheat by September 30 under this offer. U.S. exporters will be given USDA generic certificates in sufficient quantity to make it possible for them to make U.S. prices competitive.

On August 4, USDA announced that exporters may qualify for CCC bonus of \$13 per metric ton on sales of wheat made to the Soviet Union under the Export Enhancement Program. The exporter's application for the bonus must include the terms of the sales contract. The bonus payment will be made in the form of a commodity certificate which may be redeemed for a commodity from CCC inventory.

Announcements of CCC bonus levels will be made each Friday after 3:00 p.m., taking into account world market conditions. Awards will be made for up to 4 million metric tons of wheat on a first-come, first-served basis.

USSR Grain Buying Modest

USSR grain purchases for delivery in the 1986/87 marketing year continue modest. Grain purchases so far are thought to total only around 5 million tons, not much different from the pace set a year ago. So far, Canada is about the only supplier that is believed to have made significant sales to the USSR for delivery in 1986/87. Some earlier EC sales are believed to have been shipped in July, however, the EC has yet to make any sales for delivery from the 1986 crop. The USSR has apparently shown little interest in either old crop Argentine corn and sorghum or Southern Hemisphere new crop wheat.

The timing of USSR grain purchases is unusually uncertain given recent developments in the world market. Prospects that the world coarse grain market could make further adjustments to the new lower U.S. coarse grain loan rates, along with a heightening of competition in the world wheat market could encourage Soviet grain buyers to delay purchases. Even with a relatively modest level of import during the July-September 1986 period, recent USSR import patterns suggest that they could easily import 30 million tons during the remaining 9 months of the July-June marketing year.

USSR grain imports for July-June 1986/87 are projected at 36 million tons up 2 million tons from a month ago and the third largest ever. The estimate of wheat and coarse grain imports at 19 million tons and 16 million tons respectively, are each up a million tons from the month earlier estimate. Miscellaneous grain, rice and pulse imports account for the balance of one million tons.

USSR Grain Utilization Estimate Holds; Stocks to Decline Further

Soviet grain utilization for 1986/87, excluding feed and an allowance for dockage and waste is projected at 79 million tons, basically

unchanged from recent years. The allowance for dockage and waste has been placed at around 10 percent of the projected crop or 17 million tons. Domestic feed use is estimated at 119 million tons, the smallest since 1982/83. A series of good forage crops have enabled the Soviets to reduce their dependence on grain in livestock rations. As utilization needs are projected to exceed the usable portion of the 1986 crop, the USSR is expected to draw even more heavily on grain stocks accumulated since 1983/84.

Livestock Numbers Stable, Production Up

Livestock inventories on state and collective farms as of July 1, continued to run close to or above record levels for cattle, hogs, and poultry. Movements in these inventories in recent months have been close to the average for the past few years, with the exception of poultry which underwent nearly a 2 percent decline in inventories between May 1, and July 1. This is the largest decline in poultry inventories in May and June since at least 1973. Cattle numbers remain at record levels and cow numbers remain below the levels of the last few years. Hog numbers are just shy of the previous record.

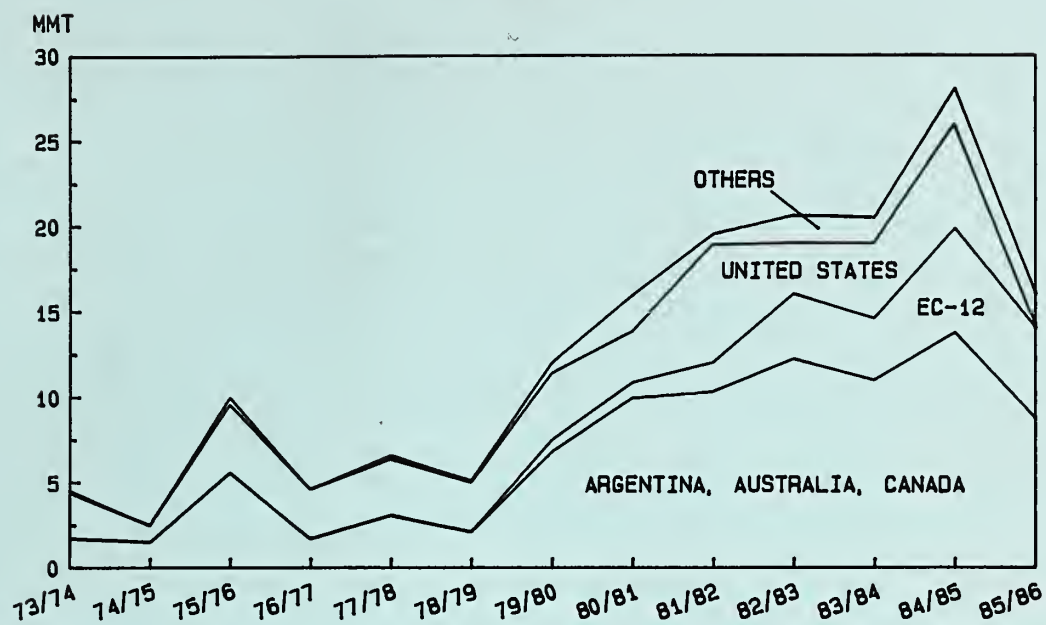
USSR: Livestock Inventories on State and Collective Farms July 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|--------------------|-------|-------|-------|-------|-------|
| -- Million head -- | | | | | |
| Cattle | 94.9 | 96.3 | 98.3 | 98.3 | 99.2 |
| of which cows | 30.1 | 30.0 | 29.9 | 29.8 | 29.4 |
| Hogs | 56.6 | 59.3 | 60.3 | 57.9 | 60.2 |
| Sheep and Goats | 141.5 | 143.7 | 143.6 | 139.1 | 142.8 |
| Poultry | 751.1 | 766.2 | 778.0 | 790.4 | 788.1 |

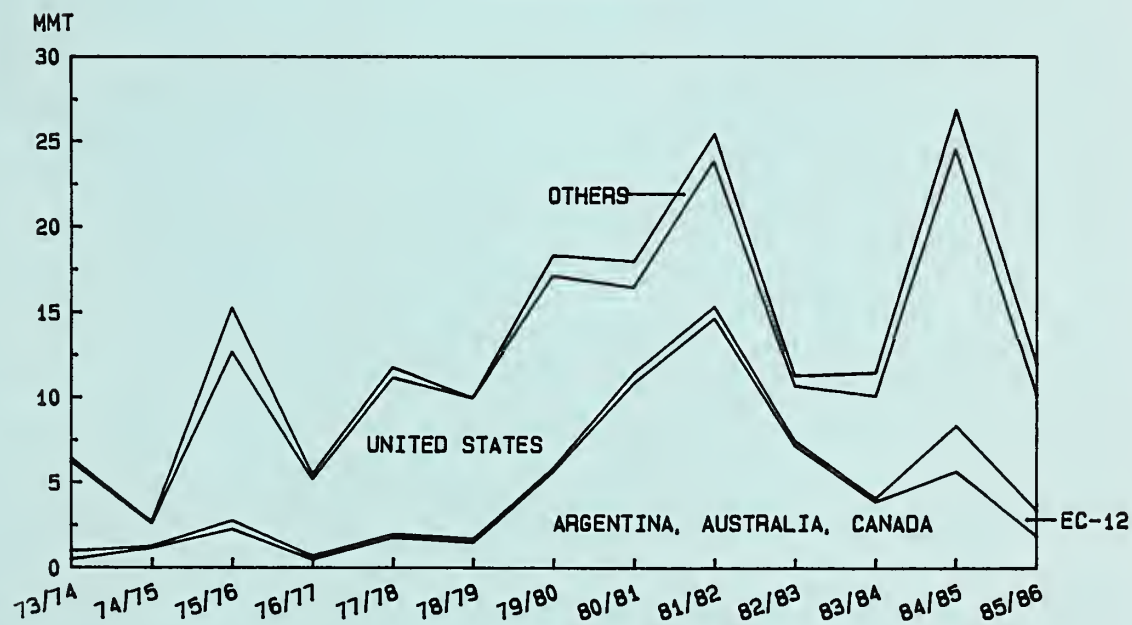
Prepared by the USDA Interagency Task Force on the USSR Grain Situation

USSR GRAIN IMPORTS 1/

WHEAT 2/



COARSE GRAINS



- 1/ Wheat and coarse grain imports are on a July/June basis.
- 2/ Does not include wheat flour and products.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1984 (Preliminary), 1985 (Estimate)
and 1986 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production ^{1/} (Million) (Metric Tons) |
|------------------------------------|----------------------------|---|--|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Preliminary) | 51.1 | 1.43 | 73.0 |
| 1985 (Estimate) | 50.3 | 1.65 | 83.0 |
| 1986 (Forecast) | 48.8 | 1.55 | 76.0 |
| <u>Coarse Grains ^{2/}</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Preliminary) | 61.2 | 1.62 | 99.0 |
| 1984 (Preliminary) | 59.2 | 1.45 | 86.0 |
| 1985 (Estimate) | 58.5 | 1.61 | 94.0 |
| 1986 (Forecast) | 58.0 | 1.48 | 86.0 |
| <u>Total Grain ^{3/}</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Preliminary) | 119.6 | 1.42 | 170.0 |
| 1985 (Estimate) | 117.9 | 1.61 | 190.0 |
| 1986 (Forecast) | 116.8 | 1.50 | 175.0 |

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

| Year | Production | Trade (Jul/Jun) | | Exports | Availability 1/ July/June | Total 1/ Metric Tons | Seed | Industrial | Food | Dockage/ | | Feed | Stock Change 3/ July/June |
|------|------------|-----------------|---------|---------|------------------------------|-------------------------|------|------------|------|----------|--|------|------------------------------|
| | | Imports | Exports | | | | | | | Waste 2/ | | | |

| | | | | | | | | | | | | | |
|-------------------|-----|------|-----|-----|------------------------|--|--|--|---|----|----|-----|-----|
| 1975/76 | 140 | 26.1 | 0.7 | 166 | Total Grains 4/ 180 | | | | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | | | | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | | | | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | | | | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | | | | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ 6/ | 189 | 34.8 | 0.5 | 223 | 225 | | | | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | | | | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | | | | 4 | 47 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | 222 | 219 | | | | 4 | 47 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | 224 | 218 | | | | 4 | 47 | 19 | 121 | +6 |
| 1985/86 5/ 6/ | 190 | 29.0 | 1.0 | 218 | 218 | | | | 4 | 48 | 18 | 121 | 0 |
| Projected 1986/87 | 175 | 36.0 | 1.0 | 210 | 215 | | | | 4 | 48 | 17 | 119 | -5 |

| | | | | | | | | | | | | | |
|-------------------|-----|------|-----|-----|-------------|--|--|--|---|----|----|----|-----|
| 1975/76 | 66 | 10.1 | 0.5 | 76 | Wheat 87 | | | | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | | | | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | | | | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | | | | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | | | | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ 6/ | 98 | 16.0 | 0.5 | 114 | 115 | | | | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | | | | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | | | | 1 | 36 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | 99 | 97 | | | | 1 | 36 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | 100 | 96 | | | | 1 | 36 | 8 | 36 | +4 |
| 1985/86 5/ 6/ | 83 | 16.0 | 1.0 | 98 | 98 | | | | 1 | 37 | 8 | 37 | 0 |
| Projected 1986/87 | 76 | 19.0 | 1.0 | 94 | 97 | | | | 1 | 37 | 7 | 37 | -3 |

| | | | | | | | | | | | | | |
|-------------------|-----|------|-----|-----|---------------------|--|--|--|---|---|----|----|----|
| 1975/76 | 66 | 15.6 | -- | 81 | Coarse Grains 84 | | | | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | | | | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | | | | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | | | | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | | | | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ 6/ | 81 | 18.0 | -- | 99 | 100 | | | | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | | | | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | | | | 3 | 7 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 99 | 11.5 | -- | 110 | 109 | | | | 3 | 7 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 86 | 26.9 | -- | 113 | 111 | | | | 3 | 7 | 10 | 80 | +2 |
| 1985/86 5/ 6/ | 94 | 12.0 | -- | 106 | 106 | | | | 3 | 7 | 9 | 76 | 0 |
| Projected 1986/87 | 86 | 16.0 | -- | 102 | 104 | | | | 3 | 7 | 9 | 74 | -2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

USSR IMPORTS OF WHEAT AND COARSE GRAINS BY SOURCE 1976/77-1985/86
July/June Years
(Million Metric Tons)

| | 1976/77 | 1977/78 | 1978/79 | 1979/80 | Prelim. 1980/81 | Prelim. 1981/82 | Prelim. 1982/83 | Prelim. 1983/84 | Prelim. 1984/85 | Projected 1985/86 |
|---------------|------------|------------|------------|-------------|--------------------|--------------------|--------------------|--------------------|--------------------|----------------------|
| Wheat | | | | | | | | | | |
| U.S. 1/ | 2.9 | 3.3 | 2.9 | 3.9 | 3.0 | 6.9 | 3.0 | 4.4 | 6.1 | .2 |
| Canada | 1.2 | 1.7 | 2.0 | 2.1 | 4.5 | 4.8 | 7.0 | 5.8 | 7.6 | 4.8 |
| Australia | .4 | .3 | .1 | 2.7 | 2.5 | 2.4 | 1.0 | 1.6 | 2.1 | 3.2 |
| Argentina | .1 | 1.1 | -- | 2.0 | 3.0 | 3.1 | 4.2 | 3.6 | 4.1 | .7 |
| EC | -- | -- | -- | .7 | .9 | 1.7 | 3.4 | 3.6 | 6.1 | 5.3 |
| Others | -- | .2 | .1 | .6 | 2.1 | .6 | 1.6 | 1.5 | 2.1 | 1.8 |
| TOTAL* | 4.6 | 6.7 | 5.1 | 12.1 | 16.0 | 19.5 | 20.2 | 20.5 | 28.1 | 16.0 |

Coarse Grains

| | | | | | | | | | | |
|---------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| U.S. 1/ | 4.5 | 9.2 | 8.3 | 11.3 | 5.0 | 8.5 | 3.2 | 6.0 | 16.2 | 6.8 |
| Canada | .2 | .2 | .1 | 1.3 | 2.3 | 4.4 | 1.8 | .5 | .7 | .6 |
| Australia | .1 | -- | -- | 1.3 | .4 | .1 | -- | .1 | 1.1 | .1 |
| Argentina | .2 | 1.6 | 1.4 | 3.1 | 8.2 | 10.2 | 5.4 | 3.3 | 3.9 | 1.2 |
| EC | .2 | .2 | .2 | .2 | .6 | .7 | .3 | .2 | 2.7 | 1.5 |
| Others | .3 | .6 | -- | 1.2 | 1.5 | 1.6 | .6 | 1.4 | 2.3 | 1.8 |
| TOTAL* | 5.7 | 11.7 | 10.0 | 18.3 | 18.0 | 25.5 | 11.3 | 11.5 | 26.9 | 12.0 |

Total

| | | | | | | | | | | |
|---------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| U.S. 1/ | 7.4 | 12.5 | 11.2 | 15.2 | 8.0 | 15.4 | 6.2 | 10.4 | 22.3 | 7.0 |
| Canada | 1.4 | 1.9 | 2.1 | 3.4 | 6.8 | 9.2 | 8.8 | 6.3 | 8.3 | 5.4 |
| Australia | .5 | .3 | .1 | 4.0 | 2.9 | 2.5 | 1.0 | 1.7 | 3.2 | 3.3 |
| Argentina | .3 | 2.7 | 1.4 | 5.1 | 11.2 | 13.3 | 9.6 | 6.9 | 8.0 | 1.9 |
| EC | .2 | .2 | .2 | .9 | 1.5 | 2.4 | 3.7 | 3.8 | 8.8 | 6.8 |
| Others | .3 | .8 | .1 | 1.8 | 3.6 | 2.2 | 2.2 | 2.9 | 4.4 | 3.6 |
| TOTAL* | 10.3 | 18.4 | 15.1 | 30.4 | 34.0 | 45.0 | 31.5 | 32.0 | 55.0 | 28.0 |

-- Denotes less than 50,000 tons.

* Totals may not add due to rounding. Excludes rice and pulses. Included grain equivalent of flour.

1/ U.S. exports based upon Export Sales data, which normally include transshipments whereas Census data may not.

SOURCE: Based on reports of countries exporting to the USSR.

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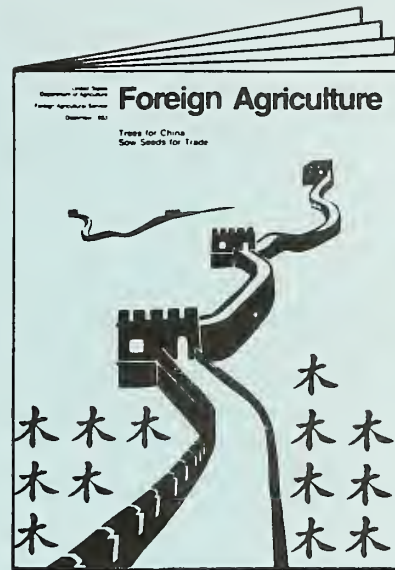
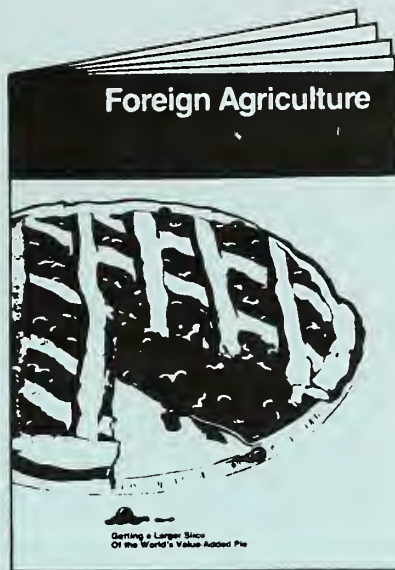
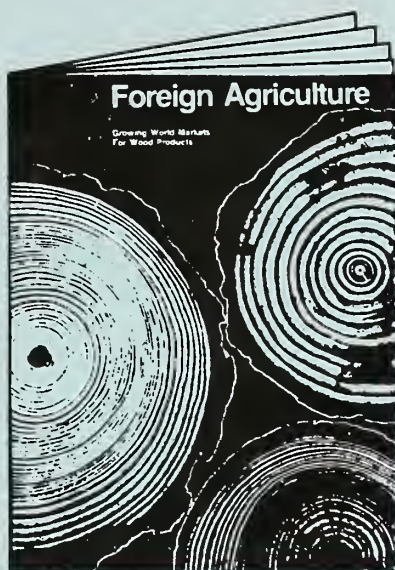
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Grains

SG-9-86
September 1986

USSR Grain Situation and Outlook

Prospects for the 1986 grain crop are basically unchanged from a month ago. The crop, currently estimated at 175 million tons, comes from the smallest estimated area since the harvest of 1960. USSR grain imports picked up late in the 1985/86 marketing year. However, buying activity has been slow to develop for 1986/87 delivery.

1986 Crop Estimate Unchanged

The 1986 Soviet grain harvest continues to be estimated at 175 million tons including 76 million wheat, 86 million coarse grains and 13 million miscellaneous grains and pulses. The grain area estimate also remains unchanged at 116.8 million hectares.

The most recent harvest progress report (September 1) stated that small grains and pulses had been cut on 78.8 million hectares and threshed on 71.4 million hectares. It also reported that corn for grain had been harvested on only 369,000 thousand hectares.

Recent Weather Developments

Prolonged dryness continued in August over the southern and eastern Ukraine, the North Caucasus, the southern Black Soils, and the Volga. August's dry weather was accompanied by above-normal temperatures, which hastened the maturity of summer crops and aided spring grain harvesting. Frequent showers resulted in above normal August precipitation over crop areas in the Baltics, Belorussia, the northwestern Ukraine, and the Central Region. The rain likely slowed spring grain harvesting but provided needed soil moisture for winter grain planting. Preparation of fields for winter grain planting was underway in major winter wheat producing areas of the south.

Widespread, frequent showers through mid-August in the northern Urals and Western Siberia benefited grain filling. Dry weather covered these areas, in late August and early September, helping the harvest in the south and enhancing crop maturation in the north. From August 31 to September 2, sub-freezing temperatures covered several locations—about 1 week ahead of normal in the north and 2 weeks ahead in the south. Minimum temperatures ranged from 0 to minus 2 degrees C, with isolated locations reporting temperatures as low as minus 4 degrees C. However, damage to spring grains likely was minimal, as most of the crop was mature or nearing maturity.

Recently, dry weather covered the European USSR. The optimum time for planting in major southern winter wheat producing areas is mid-September and pre-planting moisture is needed. Elsewhere, dry weather in spring wheat areas of the New Lands helped harvesting.

Approved by the World Agricultural Outlook Board - USDA

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Grain Purchases Lag

USSR grain buying activity continues to run below expectations. A number of factors may be contributing to this including, expectations for lower grain prices in the international market place, reduced foreign exchange availabilities reflecting reduced export earnings, consideration of some proposed changes in contract terms and possible organizational developments which may have affected the import decision process.

It does not appear that any of the major grain suppliers have sold wheat or coarse grains to the USSR since the new stricter contract terms were announced. Recent reports indicate that Canada may have sold the USSR significant quantities of wheat and barley for shipment during the first half of the August-July 1986/87 agreement year. However, it may be that these sales were under negotiation for some time and were possibly made under the old contract terms. Despite the United States' offer to include the USSR in the Export Enhancement Program for up to 4 million tons of wheat if purchases were made by September 30, 1986, no business has yet been reported. The last U.S. corn sold to the USSR was shipped in June and no sales are currently outstanding. Reports from the EC continue to indicate active interest in wheat and barley sales to the USSR. However, as the Commission has yet to fully formulate this year's export program no sales have been made. The Soviet Union continues to show only limited interest in Southern Hemisphere wheat and coarse grain supplies. This has had a significant effect on Argentina as coarse grain sales to the USSR during the current agreement year (calendar 1986) are likely to fall far short of the required 4 million tons.

The low level of estimated USSR grain imports during the first 3 months of the 1986/87 marketing year and the lack of forward purchases raises some question as to whether or not total grain imports for the 1986/87 marketing year will reach 36 million tons. However, in recent years the USSR has proven that they can maintain a heavy import program through the winter months and well into the spring. For example, during 1984/85 when imports reached an all time high of over 55 million tons, imports during the last 9 months of the marketing year totaled over 40 million tons. As of early September, the USSR is thought to have only covered 3 to 4 million tons of their projected wheat imports of 19 million and less than 2 million tons of the projected 16 million coarse grain imports.

Import Estimate for 1985/86 Revised

The estimate of total grain imports has been increased to 29.5 million tons up 500,000 from a month ago. In addition to changes in wheat and coarse grain import estimates, the estimate of miscellaneous grain imports was reduced slightly. The modest increase in total imports was accommodated by increasing the estimate of coarse grain stocks change.

Recent data on major exporter shipments to the USSR indicates that wheat shipments to the USSR fell somewhat short of the projected 16 million tons. The EC continued to be the largest seller of wheat, accounting for over a third of the total. Canada was the second largest seller, followed by Australia. Sales by the United States were less than even Sweden and India. In contrast to the wheat picture, the estimate of USSR coarse grain imports was increased by a million tons to 13 million tons. Much of this increase reflects larger than expected corn shipments by China, which is believed to have shipped a record 2 million tons this past year. Barley shipments from the EC and Scandinavian countries also exceeded earlier expectations.

Domestic Use Estimate Unchanged

The estimate of USSR grain utilization for 1986/87 of 215 million tons remains unchanged from a month ago. A good forage crop and favorable grain harvesting season supports reduced estimates for both dockage and waste and livestock feed utilization this year.

Feed Situation Good

Soviet non-grain feed supplies in 1986/87 are expected to equal or slightly exceed the record level of 1985/86. Production of hay and haylage this year was very good and early results show corn silage production on a record setting pace. The quality of this year's roughage crops is also reportedly better than last year's. Production of artificially dehydrated feeds is off, primarily because of a cut-back in fuel for drying.

USSR: Harvest of roughages as of August 25,
1983, 1984, 1985, and 1986

| | 1983 | 1984 | 1985 | 1986 |
|---|------|------|------|------|
| --million tons-- | | | | |
| Hay | 67.1 | 57.5 | 64.5 | 66.5 |
| Haylage | 62.8 | 62.4 | 70.0 | 66.3 |
| Grass meal | 6.0 | 5.6 | 5.6 | 4.8 |
| Silage | 50.9 | 51.7 | 50.2 | 55.3 |
| Total in oat unit equivalent <u>2/</u> | 66.8 | 62.1 | 67.6 | 67.6 |

Livestock Numbers Up Slightly

As of August 1, inventories of cattle and hogs on state and collective farms were at record levels. Expansion of poultry inventories has momentarily stalled with poultry numbers slightly below the record of 1985. Emphasis is expected to remain on increased output per head rather than increased inventories.

USSR: Livestock Inventories on State and Collective Farms,
August 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|------------------|-------|-------|-------|-------|-------|
| --million head-- | | | | | |
| Cattle | 94.6 | 96.0 | 97.9 | 97.9 | 98.8 |
| of which cows | 30.0 | 29.9 | 29.8 | 29.6 | 29.3 |
| Hogs | 58.2 | 61.0 | 61.8 | 59.4 | 62.0 |
| Sheep and goats | 137.6 | 140.0 | 139.4 | 135.3 | 139.0 |
| Poultry | 756.0 | 777.0 | 786.7 | 803.3 | 798.1 |

Prepared by the USSR Inter-Agency Task Force on the USSR Grain Situation.

EXCHANGE Rec'd

USSR Grain Area, Yield, and Production
1975-1980,
1981-1984 (Preliminary), 1985 (Estimate)
and 1986 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production ^{1/} (Million) (Metric Tons) |
|------------------------------------|----------------------------|---|--|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Preliminary) | 51.1 | 1.43 | 73.0 |
| 1985 (Estimate) | 50.3 | 1.65 | 83.0 |
| 1986 (Forecast) | 48.8 | 1.55 | 76.0 |
| <u>Coarse Grains ^{2/}</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Preliminary) | 61.2 | 1.62 | 99.0 |
| 1984 (Preliminary) | 59.2 | 1.45 | 86.0 |
| 1985 (Estimate) | 58.5 | 1.61 | 94.0 |
| 1986 (Forecast) | 58.0 | 1.48 | 86.0 |
| <u>Total Grain ^{3/}</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Preliminary) | 119.6 | 1.42 | 170.0 |
| 1985 (Estimate) | 117.9 | 1.61 | 190.0 |
| 1986 (Forecast) | 116.8 | 1.50 | 175.0 |

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

| Year | Production | USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87 | | | Total 1/ Metric Tons | Seed | Industrial | Food | Dockage/ Waste 2/ Feed | Stock Change July/June |
|-------------------|------------|---|---------|------------------------------|--------------------------------|------|------------|------|------------------------------|---------------------------|
| | | Trade (Jul/Jun) | Exports | Availability 1/ July/June | | | | | | |
| | | Imports | | | (Million | | | | | |
| | | | | | Total Grains 4/ Metric Tons | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | -13 |
| 1980/81 | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | -2 |
| 1981/82 | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | -4 |
| 1982/83 | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | -1 |
| 1983/84 | 190 | 32.9 | 0.5 | 222 | 219 | 27 | 4 | 47 | 21 | +3 |
| 1984/85 | 170 | 55.5 | 1.0 | 224 | 218 | 27 | 4 | 47 | 19 | +6 |
| 1985/86 | 190 | 29.5 | 1.0 | 218 | 218 | 27 | 4 | 48 | 18 | 0 |
| Projected 1986/87 | 175 | 36.0 | 1.0 | 210 | 215 | 27 | 4 | 48 | 17 | -5 |
| Wheat | | | | | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | -13 |
| 1980/81 | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | -1 |
| 1981/82 | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | -3 |
| 1982/83 | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 0 |
| 1983/84 | 79 | 20.5 | 0.5 | 99 | 97 | 15 | 1 | 36 | 9 | +2 |
| 1984/85 | 73 | 28.1 | 1.0 | 100 | 96 | 15 | 1 | 36 | 8 | +4 |
| 1985/86 | 83 | 15.7 | 1.0 | 98 | 98 | 15 | 1 | 37 | 8 | 0 |
| Projected 1986/87 | 76 | 19.0 | 1.0 | 94 | 97 | 15 | 1 | 37 | 7 | -3 |
| Coarse Grains | | | | | | | | | | |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 0 |
| 1980/81 | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | -1 |
| 1981/82 | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | -1 |
| 1982/83 | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | -1 |
| 1983/84 | 99 | 11.5 | -- | 110 | 109 | 11 | 3 | 7 | 11 | +1 |
| 1984/85 | 86 | 26.9 | -- | 113 | 111 | 11 | 3 | 7 | 10 | +2 |
| 1985/86 | 94 | 13.0 | -- | 107 | 107 | 11 | 3 | 7 | 9 | 0 |
| Projected 1986/87 | 86 | 16.0 | -- | 102 | 104 | 11 | 3 | 7 | 9 | -2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

FAS, Grain and Feed Division

September 10, 1986

USSR Total Grain Imports ^{1/}
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total ^{2/} |
|--------------|-------|--------|-----------|---------------------|-----------|-----------|---------------------|
| July 1983 | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 | 933 | 3,641 | |
| June | 255 | 1,124 | --- | 155 | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 845 | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 59 | 286 | 2,143 | |
| August | 1,231 | 1,408 | 115 | 444 | 330 | 3,528 | |
| September | 2,172 | 1,254 | 132 | 943 | 293 | 4,794 | |
| July-Sept | 3,662 | 4,143 | 305 | 1,446 | 909 | 10,465 | 11,300 |
| October | 2,320 | 809 | 152 | 966 | 302 | 4,549 | |
| November | 3,014 | 961 | 244 | 840 | 99 | 5,158 | |
| December | 3,535 | 96 | 100 | 512 | 230 | 4,473 | |
| Oct-Dec | 8,869 | 1,866 | 496 | 2,318 | 631 | 14,180 | 14,800 |
| January 1985 | 2,218 | 98 | 154 | 599 | 1,082 | 4,151 | |
| February | 2,196 | --- | 215 | 572 | 1,248 | 4,231 | |
| March | 2,023 | 17 | 667 | 934 | 926 | 4,567 | |
| Jan-March | 6,437 | 115 | 1,036 | 2,105 | 3,256 | 12,949 | 14,000 |
| April | 2,016 | 388 | 716 | 930 | 1,225 | 5,275 | |
| May | 1,566 | 1,237 | 468 | 921 | 1,368 | 5,560 | |
| June | 106 | 481 | 211 | 1,116 | 580 | 2,494 | |
| April-June | 3,688 | 2,106 | 1,395 | 2,967 | 3,173 | 13,329 | 14,700 |
| July | 8 | --- | 25 | 208 ^{3/} | 443 | 684 | |
| August | --- | --- | --- | 152 ^{3/} | 281 | 433 | |
| September | --- | 1,384 | --- | 75 ^{3/} | 59 | 1,518 | |
| July-Sept | 8 | 1,384 | 25 | 435 ^{3/} | 783 | 2,635 | 3,600 |
| October | 411 | 1,057 | 89 | 200 ^{3/} | 316 | 2,073 | |
| November | 2,487 | 900 | 212 | 485 ^{3/} | 423 | 4,507 | |
| December | 1,337 | 750 | 101 | 1,155 ^{3/} | 57 | 3,400 | |
| Oct-Dec | 4,235 | 2,707 | 402 | 1,840 ^{3/} | 796 | 9,980 | 11,400 |
| January 1986 | 980 | 171 | 450 | 1,160 ^{3/} | 15 | 2,776 | |
| February | 956 | --- | 494 | 1,100 ^{3/} | --- | 2,550 | |
| March | 71 | --- | 850 | 850 ^{3/} | --- | 1,771 | |
| Jan-March | 2,007 | 171 | 1,794 | 3,110 ^{3/} | 15 | 7,097 | 7,800 |
| April | --- | --- | 373 | 500 ^{3/} | --- | 873 | |
| May | 172 | 435 | 575 | 550 ^{3/} | 220 | 1,952 | |
| June | 547 | 646 | 34 | 600 ^{3/} | 172 | 1,999 | |
| April-June | 719 | 1,081 | 982 | 1,650 | 392 | 4,824 | 5,900 |

^{1/} Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

^{2/} Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

^{3/} Preliminary

N/A Not Available

FAS, Grain and Feed Division
September 10, 1986

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Grains

24 '86

SG-10-86
October 10, 1986

USSR Grain Situation and Outlook

The highlights of this month's USSR grain outlook include:

- Increased domestic supplies as a result of an improved 1986 crop outlook.
- A significant reduction in projected imports as USSR grain purchases continue to lag.

1986 Crop Estimate Increased

The 1986 Soviet grain crop is estimated at 180 million metric tons, 5 million more than last month's estimate. The total area estimate was revised up by 700,000 hectares to 117.5 million. The 5-million-ton increase includes 1 million wheat, now estimated at 77 million tons, and 4 million coarse grains, now estimated at 90 million tons. The estimate of miscellaneous grains and pulses is unchanged at 13 million tons. The increase in estimated wheat production was due to a slight increase in estimated yields. The increase in estimated coarse grain production includes 1.5 million tons of spring barley and 2.5 million of corn. The barley estimate was increased because of higher yield estimates. The corn production estimate was raised because of a slight increase in estimated yields and a 700,000 hectare increase in estimated area. Preliminary reports indicate that there was a smaller than normal diversion of corn area into silage and high-moisture corn uses.

The most recent harvest progress report (October 6) stated that small grains and pulses had been cut on 105.8 million hectares and threshed on 104.9 million hectares.

Recent Weather Developments

In European USSR, corn was being harvested while winter wheat planting advanced southward. Persistent showers during September covered the Baltics and Belorussia, the Central Region and the Volga Vyatsk, providing abundant soil moisture for winter grain emergence. However, September temperatures in these areas were below-normal, slowing early crop growth. Further south, September precipitation was below normal over much of the Ukraine, North Caucasus, and the lower Volga. The relatively dry weather in these areas allowed crop harvesting and winter grain planting to progress without delay. However, topsoil moisture was too low for uniform seed emergence and plant establishment, especially in the southern Ukraine where cumulative precipitation since August has been less than 50 percent of normal. On September 29, about 2 to 3 weeks ahead of normal, freezing temperatures were recorded as far south as the Black Sea.

In spring grain areas east of the Ural mountains, below-normal September precipitation in southern and eastern areas helped harvesting. In the northern Urals and western-most crop areas of Western Siberia, frequent showers slowed harvesting.

Recently, unseasonably cool, wet weather continued over northern European USSR, slowing winter grain establishment. Unseasonably cool, dry weather in major southern winter wheat producing areas continued to create unfavorable conditions for crop emergence and early growth. In the New Lands, continued showers in the northwest delayed final harvest efforts.

1986/87 Import Estimate Reduced

Reflecting the slow pace of USSR grain purchases to date and an increase in domestic supplies because of an improvement in the crop outlook, the projection of USSR grain imports for the 1986/87 marketing year has been reduced by 4 million tons to 32 million. At this level imports would still be up marginally from a year ago, but far short of the record 1984/85 imports of 55.5 million tons. Wheat imports, currently projected at 16 million tons, are down 3 million from a month ago but little different from the 1985/86 estimate and well below the levels of other recent years. Coarse grain imports, now estimated at 15 million tons, are down a million from the month earlier estimate but still above the 1985/86 level. Rice, miscellaneous grains and pulses account for the balance.

A number of factors may be contributing to this year's reduced imports, including reduced foreign exchange earnings, good forage crop prospects which could limit the need to increase grain feeding over last year's level, increased domestic procurements of high quality wheat which might lessen USSR requirements for quality imported wheat, and changes in the organization of foreign trade which may have affected grain import decisions.

USSR grain buying activity continues to run well behind levels of recent years. As of early October, commitments from all origins were estimated in the area of 7 million tons. A year ago at this time the USSR had purchased around 12 million tons and by early October 1984 purchases for the 1984/85 marketing year were approaching 30 million tons as the USSR was on its way to a record import year. Over the past month the USSR is believed to have purchased modest quantities of wheat from the EC, Austria, and Australia. The EC was the major seller with sales of over 1 million tons.

Despite prospects for a relatively good crop, Soviet coarse grain imports are expected to continue large in 1986/87 as world coarse grain prices stay depressed. So far purchases appear to have been limited to Canadian barley and Eastern European and Chinese corn. However, if the pattern of recent years is repeated, the pace of USSR coarse grain purchases should pick up as the second half of the marketing year is normally by far the heaviest coarse grain import period.

Despite prospects for large exportable wheat supplies in the world in 1986/87 and relatively low prices, the USSR has been slow to cover its import needs. So far, Soviet grain buyers have covered about a fourth of this year's projected wheat imports.

Prospects for grain sales to the USSR by the major grain exporting nations could be reduced if large grain supplies in Eastern Europe and China result in a pick-up in trade with the USSR. Large grain crops in a number of the East European countries and the need for foreign exchange is expected to encourage these countries to move into the export market. Their grain sales to the USSR may increase as sales opportunities in other markets may be limited. Yugoslavia has already reported corn sales to the USSR and additional sales

could be made. Chinese corn prospects appear to be good again in 1986/87 and their corn sales to the USSR could easily reach the agreement level of 1.5 million tons.

U.S. - USSR LTA

The USSR purchased no additional U.S. wheat despite their recent inclusion for a limited period in the Export Enhancement Program for wheat. This marked the second consecutive year that the USSR failed to live up to its commitment to purchase a minimum of 4 million tons of wheat under the Long-Term Grain Agreement. The following table shows trade under the new Grain Agreement.

| U.S. Exports to the USSR October-September 1,000 Tons | | | | |
|---|---------|---------|---------|-------------------|
| | 1983/84 | 1984/85 | 1985/86 | 1986/87 <u>1/</u> |
| Wheat | 7,593 | 2,887 | 153 | --- |
| Corn | 6,476 | 1,575 | 6,808 | --- |
| Soybeans | 416 | --- | 1,519 | --- |

1/ Sales to date

Domestic Use Estimate Increased

The increase in the 1986 grain crop estimate has been reflected in a 4 million ton reduction in the import estimate and a modest increase in the estimate of grain used for feed to 120 million tons. Given the continued strong outlook for the livestock sector, demand for grain for feed is expected to hold near the level of recent years, despite another year of large forage supplies. In order to meet domestic grain requirements, the USSR is still expected to dip modestly into stocks that have been accumulated in recent years.

Forage Harvest Progress

By September 22, the forage harvest remained roughly on par with last year's record pace, but there was some sign of slowing in the rate of silage harvesting. It is now less likely that this year's roughage crop will exceed last year's record.

USSR: Harvest of roughages as of September 22,
1983, 1984, 1985, and 1986 1/

| | 1983 | 1984 | 1985 | 1986 |
|---|-------|-------|-------|-------|
| -- Million tons -- | | | | |
| Hay | 73.2 | 64.0 | 72.9 | 73.2 |
| Haylage | 66.2 | 65.6 | 73.9 | 71.2 |
| Grass meal | 7.0 | 6.4 | 6.4 | 5.5 |
| Silage | 165.1 | 164.6 | 179.7 | 189.4 |
| Total in oat unit equivalent <u>2/</u> | 94.3 | 89.4 | 99.3 | 99.6 |

1/ For 1983-85 data are interpolated.

2/ Using the following oat unit coefficients: hay, 0.45; haylage, 0.34; grass meal, 0.84; silage, 0.20.

Livestock Sector Strong

Inventories of cattle and hogs remained at record levels on state and collective farms as of September 1. Poultry numbers are slightly behind last year's record and cow numbers remain lower than in recent years. The policy of shifting livestock growth strategy to more output per head rather than expanding animal inventories appears to be achieving some results in 1986. Average milk yields on state and collective farms are reportedly up 5-6 percent over last year, egg yields are up 6-7 percent, and despite slightly lower poultry inventories, poultry meat output continues to run more than 10 percent ahead of last year's pace.

USSR: Livestock Inventories on State and Collective Farms September 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|--------------------|-------|-------|-------|-------|-------|
| -- Million head -- | | | | | |
| Cattle | 93.6 | 95.1 | 97.0 | 96.9 | 97.9 |
| of which cows | 30.0 | 29.9 | 29.8 | 29.6 | 29.2 |
| Hogs | 59.1 | 61.8 | 62.6 | 60.3 | 63.1 |
| Sheep and goats | 131.1 | 133.3 | 132.4 | 128.7 | 132.3 |
| Poultry | 747.0 | 764.2 | 774.7 | 803.1 | 794.7 |

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1984 (Preliminary), 1985 (Estimate)
and 1986 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons) (Per Hectare) | Production ^{1/} (Million) (Metric Tons) |
|------------------------------------|----------------------------|---|--|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Preliminary) | 50.8 | 1.56 | 79.0 |
| 1984 (Preliminary) | 51.1 | 1.43 | 73.0 |
| 1985 (Estimate) | 50.3 | 1.65 | 83.0 |
| 1986 (Forecast) | 48.8 | 1.58 | 77.0 |
| <u>Coarse Grains ^{2/}</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Preliminary) | 61.2 | 1.62 | 99.0 |
| 1984 (Preliminary) | 59.2 | 1.45 | 86.0 |
| 1985 (Estimate) | 58.5 | 1.61 | 94.0 |
| 1986 (Forecast) | 58.7 | 1.53 | 90.0 |
| <u>Total Grain ^{3/}</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Preliminary) | 120.8 | 1.57 | 190.0 |
| 1984 (Preliminary) | 119.6 | 1.42 | 170.0 |
| 1985 (Estimate) | 117.9 | 1.61 | 190.0 |
| 1986 (Forecast) | 117.5 | 1.53 | 180.0 |

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

| Year | Production | Trade (Jul/Jun) | | July/June | Total 1/ Seed | | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change July/June |
|-------------------|------------|-----------------|---------|-----------|---------------------|---------------------|------------|------|----------------------|------|---------------------------|
| | | Imports | Exports | | Million Metric Tons | Million Metric Tons | | | | | |
| Total Grains 4/ | | | | | | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 27 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| 1983/84 5/ 6/ | 190 | 32.9 | 0.5 | 222 | 219 | 27 | 4 | 47 | 21 | 120 | +3 |
| 1984/85 5/ 6/ | 170 | 55.5 | 1.0 | 224 | 218 | 27 | 4 | 47 | 19 | 121 | +6 |
| 1985/86 5/ 6/ | 190 | 29.5 | 1.0 | 218 | 218 | 27 | 4 | 48 | 18 | 121 | 0 |
| Projected 1986/87 | 180 | 32.0 | 1.0 | 211 | 216 | 27 | 4 | 48 | 17 | 120 | -5 |
| Wheat | | | | | | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| 1983/84 5/ 6/ | 79 | 20.5 | 0.5 | 99 | 97 | 15 | 1 | 36 | 9 | 36 | +2 |
| 1984/85 5/ 6/ | 73 | 28.1 | 1.0 | 100 | 96 | 15 | 1 | 36 | 8 | 36 | +4 |
| 1985/86 5/ 6/ | 83 | 15.7 | 1.0 | 98 | 98 | 15 | 1 | 37 | 8 | 37 | 0 |
| Projected 1986/87 | 77 | 16.0 | 1.0 | 92 | 95 | 15 | 1 | 37 | 7 | 35 | -3 |
| Coarse Grains | | | | | | | | | | | |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| 1983/84 5/ 6/ | 99 | 11.5 | -- | 110 | 109 | 11 | 3 | 7 | 11 | 77 | +1 |
| 1984/85 5/ 6/ | 86 | 26.9 | -- | 113 | 111 | 11 | 3 | 7 | 10 | 80 | +2 |
| 1985/86 5/ 6/ | 94 | 13.3 | -- | 107 | 107 | 11 | 3 | 7 | 9 | 77 | 0 |
| Projected 1986/87 | 90 | 15.0 | -- | 105 | 107 | 11 | 3 | 7 | 9 | 77 | -2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

6/ Production estimated as there have been no official USSR production data since the 1980 crop.

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October 14, 1986

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Grains

USSR Grain Situation and Outlook

SG-11-86

November 1986

A larger than expected 1986 grain crop along with modest USSR grain buying activity has prompted a significant reduction in the estimate of USSR grain imports for 1986/87. Reflecting a continued strong performance in the livestock sector and larger grain supplies, the estimate of grain used for feed has been increased in 1986/87.

1986 Crop Estimate Increased

The 1986 Soviet grain crop is estimated at 195 million metric tons, 15 million above last month's estimate. The total area estimate remains unchanged, however, minor adjustments in a number of grains were made based on the Soviet preliminary grain area data released in October. The 15-million-ton increase includes 4 million wheat, now estimated at 81 million tons and 10 million coarse grains, now estimated at 100 million tons. The estimate of miscellaneous grains and pulses was increased by 1 million to 14 million tons.

The upward revision in the 1986 estimate is based on analysis of the recently released 1981-85 Soviet grain production data which suggest that the 1986 yields are higher than previously estimated and on ancillary information including official Soviet statements on production and reported State procurements.

On November 6, a senior official of the Soviet Politburo indicated that the 1986 grain crop is expected to be "about" 210 million tons. This statement will receive further consideration by USDA pending additional information releases by the Soviets.

Recent Weather Developments

Below-normal October precipitation in the western and extreme eastern Ukraine, parts of the North Caucasus, and the lower Volga, continued to create unfavorable conditions for winter grain emergence and early growth. Significant showers from October 20-26 in the southern and eastern Ukraine, and the western North Caucasus improved prospects for winter grain emergence. However, unseasonably cold weather followed the rain, limiting plant establishment. Usually, winter grains enter dormancy in the south during mid-to-late November. In northern winter grain areas, October precipitation was generally below normal. However, moisture conditions were adequate for winter grains. Below-normal early October temperatures in the Central Region, Volga Vyatsk, and Upper Volga were replaced by above-normal temperatures on October 13, a pattern which continued until month's end.

Since early November, rain in the eastern Ukraine, North Caucasus, and the lower Volga improved soil moisture conditions. Unseasonably cold weather has covered the region, but no extreme cold has occurred. The cold weather eased crops into dormancy in the north, but has limited plant establishment in the south where mild weather is needed.

Grain Import Estimate Reduced

USSR grain purchases for delivery in the 1986/87 marketing year climbed modestly over the past month and now total nearly 10 million tons. However, this is well short of buying levels for comparable periods in recent years. Reflecting this and the continued improvement in the crop outlook, the estimate of USSR grain imports for July-June 1986/87, has been reduced by 6 million tons to 26 million. This would be the lowest level of grain imports since 1978/79 when a record crop was harvested. The estimate of wheat imports has been reduced by 2 million tons to 14 million, the lowest level of imports since 1979/80. There have been frequent reports in the USSR press about significantly higher sales of quality wheat to the State this year than in recent years. A major goal of the intensive technology program has been to increase the amount of quality wheat produced. Procurement price changes were also aimed at encouraging sales of this wheat to the State. These steps appear to be helping the USSR meet more of its milling requirements with domestic wheat this year. However, the modification of grading standards for both winter and spring wheat, permitting more wheat to qualify as high quality, may in part overstate the success of this program.

Despite a reduction of 4 million tons in the estimate of USSR coarse grain imports to 11 million, total coarse grain availability in 1985/86 will continue relatively large, reflecting this year's good harvest. Total USSR coarse grain purchases from all origins are currently estimated at only around 4 million tons, principally barley from Canada and the EC. The disappointing level of early season coarse grain purchases may be due in part to USSR purchases of feed wheat from Canada and the EC. Indications are that sales of feed wheat may already exceed a million tons.

The slow pace of USSR grain buying so far this marketing year may reflect a number of factors including, sharply reduced foreign exchange earnings, increased domestic procurements of high quality wheat, improved grain crop prospects and a good forage crop harvest.

Domestic Use Series Revised

A number of revisions have been made in the estimates of domestic grain use for the 1975/76-1985/86 period based on official USSR data and USDA research on information accumulated in recent years on Soviet grain utilization. Seed use was reduced primarily because of lower sowing rates for spring grains compared to the late 1960's. Industrial use of grain was increased because of evidence that a higher share of the ethyl alcohol production derives from grain than previously estimated. Recently available evidence indicates a resurgence in grain for feed use beginning in 1984/85. General Secretary Gorbachev's stress on higher animal productivity is expected to result in further increases in grain feeding in 1986/87. Food use was adjusted down by 1 million tons in 1985/86 and 1986/87, based on lower per capita consumption of bread and bread products. The estimate of dockage and waste is lower than average this year because of generally favorable harvest weather nationwide. The new production data for 1981/82-1985/86 entailed a small increase in the dockage/waste estimate for 1982/83.

The net effect of these changes in domestic use and the inclusion of the official grain production data for 1981-85 has been a modest addition to USSR grain stocks over the period.

The sharply reduced estimate of 1986/87 USSR grain imports is likely to impact on most of the world's major grain shippers.

- Canada appears to be in the most secure position as early season sales to the USSR are estimated at around 2.5 million tons. Canada and the USSR recently officially signed a new 5-year trade agreement calling for grain exports of 25 million tons over the August 1986-July 1991 period. In the past, the agreement has provided a framework for large annual Canadian grain shipments. However, reduced USSR import requirements may limit Canadian sales during the first year of the new grain agreement. So far this year, a significant portion of the wheat shipped to the USSR has been feed wheat.
- Argentina has yet to sell any new crop wheat to the USSR and old crop coarse grain sales fell far short of the required 4 million tons in Calendar Year 1986. Reports indicate that Argentina and the USSR may have agreed to count wheat purchases towards fulfillment of the agreement in future. This could provide the basis for a pickup in Argentine wheat sales to the USSR in the months ahead.
- Despite a flurry of reports, it appears that EC wheat sales to the USSR thus far total less than 2 million tons. France, assisted by a trading arrangement with the USSR, has already made sales of over a million tons. Recent reports indicate that the U.K. may have sold close to 500,000 tons of feed wheat to the USSR. With the USSR requirement for milling quality wheat thought to be down significantly this year, the magnitude of the EC program may well depend on the level of feed wheat sales.
- Following last year's record exports to the USSR of over 3 million tons, Australian wheat sales so far in 1986/87 have been slow to develop. The Australian Wheat Board recently reported that sales of 550,000 tons had been made. With the USSR wheat import demand down significantly, it is unlikely that Australia will be able to duplicate its 1985/86 success.
- Despite the inclusion of the USSR in the Export Enhancement Program for wheat for a brief period, no U.S. sales of wheat or corn have been reported so far in the 1986/87 July-June marketing year. During each of the past 2 years, the USSR has failed to live up to its commitment to purchase for shipment during each October-September period a minimum of 4 million tons of wheat under the Long-Term Grain Agreement. USSR purchases of corn have exceeded agreement minimums, however, no sales have been reported as yet for shipment during the October 1986-September 1987 period.

The USSR recently released official grain production data for the 1981-85 crops. A review of this information has been published as a supplement to the World Crop Production Report. Subscribers to the USSR circular will receive a copy of this supplement. Otherwise, if you wish to receive a copy of this report contact FAS Media and Public Affairs Branch, Foreign Agriculture Service, USDA, Room 5922, South Building, Washington D.C. 20250, or telephone 202-447-7937 and request: USSR Grain Statistics; 1981-85 in Perspective.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1985, and 1986 (Forecast)

| Grain | Area (<u>Million Hectares</u>) | Yield (Metric Tons) (<u>Per Hectare</u>) | Production <u>1/</u> (Million) (<u>Metric Tons</u>) |
|-------------------------|-------------------------------------|--|---|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 | 59.2 | 1.37 | 81.1 |
| 1982 | 57.3 | 1.47 | 84.3 |
| 1983 | 50.8 | 1.52 | 77.5 |
| 1984 | 51.1 | 1.34 | 68.6 |
| 1985 | 50.3 | 1.55 | 78.1 |
| 1986 (Forecast) | 48.7 | 1.66 | 81.0 |
| <u>Coarse Grains 2/</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.39 | 80.5 |
| 1981 | 58.0 | 1.19 | 69.3 |
| 1982 | 58.0 | 1.58 | 91.8 |
| 1983 | 61.2 | 1.67 | 101.9 |
| 1984 | 59.2 | 1.53 | 90.5 |
| 1985 | 58.5 | 1.71 | 100.0 |
| 1986 (Forecast) | 59.3 | 1.69 | 100.0 |
| <u>Total Grain 3/</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 | 125.6 | 1.26 | 158.2 |
| 1982 | 123.0 | 1.52 | 186.8 |
| 1983 | 120.8 | 1.59 | 192.2 |
| 1984 | 119.6 | 1.44 | 172.6 |
| 1985 | 117.9 | 1.62 | 191.7 |
| 1986 (Forecast) | 117.5 | 1.66 | 195.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

| Year | Production | Trade (Jul/Jun) | Imports | Exports | Availability 1/ July/June | Total 1/ Metric Tons | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change July/June |
|-------------------|------------|-----------------|---------|---------|------------------------------|-------------------------|------|------------|------|----------------------|------|---------------------------|
| | | | | | | (Million Metric Tons) | | | | | | |
| | | | | | | Total Grains 4/ | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 178 | 178 | 25 | 5 | 45 | 14 | 89 | -12 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 220 | 220 | 26 | 5 | 45 | 31 | 113 | +12 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 229 | 229 | 26 | 5 | 45 | 29 | 124 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 230 | 230 | 25 | 6 | 46 | 28 | 125 | +20 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 223 | 223 | 26 | 6 | 46 | 22 | 123 | -14 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 224 | 224 | 25 | 6 | 46 | 28 | 119 | -1 |
| 1981/82 5/ | 158 | 47.3 | 0.5 | 205 | 211 | 211 | 25 | 5 | 47 | 16 | 118 | -6 |
| 1982/83 5/ | 187 | 34.3 | 0.5 | 221 | 213 | 213 | 25 | 5 | 47 | 18 | 118 | +8 |
| 1983/84 5/ | 192 | 32.5 | 0.5 | 224 | 218 | 218 | 26 | 5 | 47 | 21 | 120 | +6 |
| 1984/85 5/ | 173 | 55.5 | .5 | 228 | 219 | 219 | 24 | 6 | 47 | 19 | 123 | +9 |
| 1985/86 5/ | 192 | 29.5 | .5 | 221 | 218 | 218 | 24 | 5 | 47 | 18 | 124 | +3 |
| Projected 1986/87 | 195 | 26.0 | 1.0 | 220 | 220 | 220 | 24 | 5 | 47 | 18 | 126 | 0 |
| | | | | | | Wheat | | | | | | |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 86 | 86 | 13 | 1 | 35 | 7 | 30 | -10 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 92 | 13 | 2 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 109 | 109 | 14 | 2 | 35 | 14 | 44 | -11 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 107 | 13 | 2 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 114 | 114 | 13 | 2 | 35 | 11 | 53 | -12 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 113 | 113 | 13 | 2 | 35 | 15 | 48 | +1 |
| 1981/82 5/ | 81 | 20.3 | 0.5 | 101 | 104 | 104 | 11 | 2 | 36 | 8 | 47 | -3 |
| 1982/83 5/ | 84 | 20.8 | 0.5 | 105 | 101 | 101 | 11 | 2 | 36 | 8 | 44 | +4 |
| 1983/84 5/ | 78 | 20.5 | 0.5 | 98 | 93 | 93 | 11 | 2 | 36 | 9 | 35 | +4 |
| 1984/85 5/ | 69 | 28.1 | .5 | 96 | 91 | 91 | 11 | 2 | 36 | 8 | 35 | +5 |
| 1985/86 5/ | 78 | 15.7 | .5 | 93 | 92 | 92 | 11 | 1 | 36 | 8 | 36 | +2 |
| Projected 1986/87 | 81 | 14.0 | 1.0 | 94 | 94 | 94 | 11 | 1 | 36 | 7 | 39 | 0 |
| | | | | | | Coarse Grains | | | | | | |
| 1975/76 | 66 | 15.6 | -- | 81 | 83 | 83 | 11 | 4 | 7 | 6 | 56 | -2 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 115 | 115 | 11 | 3 | 7 | 16 | 78 | +4 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 108 | 108 | 10 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 112 | 112 | 10 | 4 | 7 | 13 | 79 | +2 |
| 1979/80 | 81 | 18.4 | -- | 100 | 102 | 102 | 12 | 4 | 7 | 10 | 68 | -2 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 101 | 101 | 12 | 4 | 7 | 12 | 66 | -2 |
| 1981/82 5/ | 69 | 26.0 | -- | 95 | 98 | 98 | 13 | 3 | 7 | 7 | 68 | -3 |
| 1982/83 5/ | 92 | 12.5 | -- | 104 | 101 | 101 | 13 | 3 | 7 | 9 | 69 | +4 |
| 1983/84 5/ | 102 | 11.5 | -- | 113 | 112 | 112 | 13 | 3 | 7 | 11 | 78 | +2 |
| 1984/85 5/ | 90 | 26.9 | -- | 117 | 114 | 114 | 12 | 4 | 7 | 10 | 81 | +4 |
| 1985/86 5/ | 100 | 13.3 | -- | 113 | 112 | 112 | 12 | 4 | 7 | 9 | 80 | +1 |
| Projected 1986/87 | 100 | 11.0 | -- | 111 | 111 | 111 | 12 | 4 | 7 | 10 | 78 | 0 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

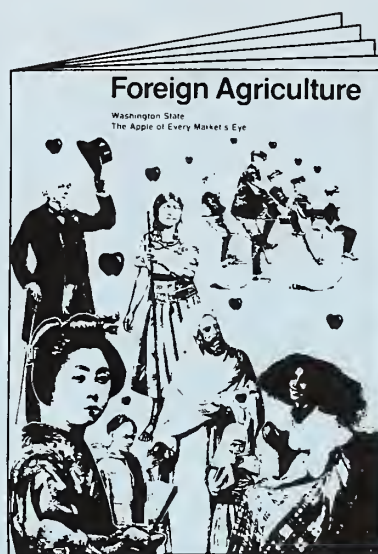
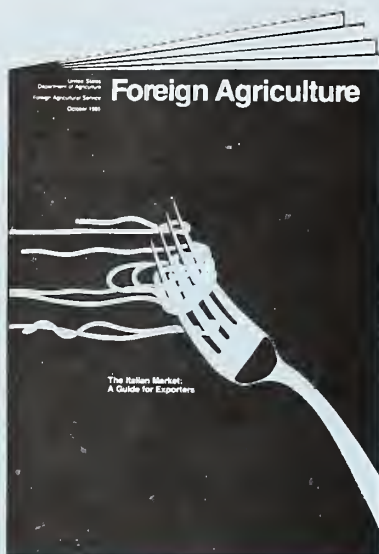
2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

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Grains

USSR Grain Situation and Outlook

SG 12-86

December 1986

The highlights of this month's review of the USSR grain situation include:

- A significant upward revision in the 1986 crop estimate.
- A further reduction in the import estimate to the lowest level since 1978/79.
- Limited Soviet grain-buying activity.

1986 Crop Estimate Increased

The 1986 Soviet grain crop is estimated at 210 million metric tons, 15 million above last month's estimate. The total area estimate has been reduced by one million hectares--all the reduction occurring in corn. The upward revision in production includes 6 million tons of wheat, now estimated at 87 million, and 8 million tons of coarse grains, now estimated at 108 million. The estimate of miscellaneous grains and pulses was increased by one million to 15 million tons.

A total grain harvest of about 210 million metric tons was reported by a senior official of the Soviet Politburo on November 6. Since then, the statement has been repeated in the Soviet news media at least a dozen times--including a recent statement by the Chairman of Gosagroprom, the State Agro-Industrial Committee. While this figure is preliminary, announcements made at this level have historically proven to be very close to final published figures.

This month's revision is supported by limited oblast and republic level yield data--most of which have become available following last month's assessment.

The grain breakout by types are USDA estimates and will be revised as official data are released by the USSR. On December 1, the Chairman of Gosagroprom reported the corn harvest to be 12.4 million tons.

Recent Weather Developments

November's precipitation was below normal over most winter grain areas except for those in the Baltic States, the Volga Vyatsk, and the upper Volga where precipitation was above normal. During November, daily temperatures over most of the European USSR averaged below 5 degrees C, well below normal. This inhibited additional crop growth. November's cold weather pattern provided moderate hardening for winter grains. However, the combination of dry planting conditions and unseasonable cold autumn weather over the Ukraine and North Caucasus likely caused spotty winter grain emergence and reduced plant vigor, making the crop more susceptible to winterkill. In late November, well-below-normal temperatures covered eastern and southeastern winter grain areas. The coldest weather occurred from November 27 through 29, when minimum temperatures dropped to around -15 degrees C. While temperatures reached the threshold for winterkill, the combination of snow cover and short duration of

Approved by the World Agricultural Outlook Board - USDA

extreme cold likely minimized the potential for significant winterkill. During the first week of December, snow cover increased in the Central Region, Volga Vyatsk, and the upper Volga. However, temperatures in the Black Soils, Ukraine, and North Caucasus rose to above freezing, diminishing snow cover. On December 8 temperatures fell below normal over these areas.

Quality Wheat Procurements Increase

The November 3 Pravda reported that state procurements of quality milling wheat were up from last year by 50 percent for hard wheat and 100 percent for durum. This seems to be the result of a combination of factors reflecting changes in state policy. These began with increases in prices for quality wheat in July 1985, lowering of quality standards for food wheat during the summer, and the targeting of wheat areas for increased production inputs. It appears that the overall policy intent, was to reduce reliance upon imported food-quality wheat. The high share of feed wheat in estimated total wheat imports seems to bear this out.

Import Estimate Reduced Again

The estimate of USSR grain imports for the 1986/87 marketing year has been reduced to 21 million tons, down 5 million from the month earlier estimate and the lowest level of imports since 1978/79, when the USSR harvested a record crop. USSR grain purchases for delivery this marketing year continue to run well behind the pace for comparable periods in earlier years. Purchases from all origins still total only around 10 million tons with Canada and the EC the largest sellers to date.

The estimate of wheat imports has been reduced an additional 2 million tons to 12 million, the lowest level since 1979/80. Wheat imports could well be even lower except that the USSR appears to be importing significant quantities of feed-quality wheat from Canada and the EC. USSR wheat purchases so far this marketing year are estimated at around 6 million tons. Canada has been the major seller, followed by the EC and Australia. Argentina and the United States are the only countries among the traditional suppliers who have yet to make sales to the USSR. Based on reports from the major suppliers, shipments to the USSR for the July-December period are expected to total over 5 million tons. This compares with average July-December imports of around 9 million tons for 1981-85. Based on the lack of recent buying activity, it appears unlikely that the USSR has fully covered wheat import needs for the January-March period. About the only reports of USSR wheat buying in recent weeks have been from India, where it appears that the Soviet Union has agreed to take the balance of 250,000 tons from earlier purchases and an additional 500,000 tons. Most of this wheat is likely to go to third countries on USSR account.

The estimate of USSR coarse grain imports for the 1986/87 marketing year has been reduced by 3 million tons to 8 million. This would be the lowest level of USSR coarse grain purchases since 1976/77. To date, Soviet grain buyers are estimated to have covered 3 to 4 million tons of their estimated 1986/87 import needs. Given the total import estimate of only 8 million tons, it appears that there are only limited opportunities for Argentina and U.S. coarse grain sales. Canadian and EC barley have accounted for the bulk of the sales so far

this marketing year. An allowance has also been made for sales of Chinese and East European corn. A number of factors are likely contributing to the sharp reduction in coarse grain imports. The 1986 USSR coarse grain crop is expected to be the second largest on record. The forage crop is also large. Foreign exchange earnings are projected to be sharply lower in 1986/87, limiting the available funds for grain imports. In addition, recent purchases of inexpensive feed-quality wheat could well displace potential coarse grain sales. Coarse grain shipments by the major suppliers to the USSR are estimated at only around 2.5 million tons for the July-December period compared with an average of around 8 million for July-December 1981-85. As was the case for wheat, shipments so far have accounted for the bulk of the outstanding sales, which suggests that the USSR still has to cover much of its January-March import needs.

USSR Grain Trade Agreements

It now appears that the bulk of the USSR's 1986/87 grain imports will move under various grain agreements or trading arrangements with supplying countries. The following is a partial list of agreements or arrangements which could impact the level of USSR grain imports during July-June 1986/87:

Canada has an agreement with the USSR that calls for the export of 25 million tons of grain during the August 1986 - July 1991 period. As the agreement has no annual minimum trade requirements, shipments in 1986/87 will likely fall well short of the recent annual average of 9 million tons, given the USSR's large 1986 grain crop. Sales to date are thought to total in the area of 3-3.5 million tons.

Argentina's 5-year agreement with the USSR calls for annual calendar year shipments of 4 million tons of coarse grains. Recent reports indicate that the two countries have agreed to count wheat purchases towards the agreement. USSR purchases of Argentine wheat and coarse grains in CY 1986 totaled less than a million tons. As yet there have been no reported USSR purchases of 1986 crop wheat. Argentina's corn and sorghum supplies are usually available for export sometime in late March.

France and the USSR have a trading arrangement which calls for annual wheat trade in the area of 1.5 to 3 million tons. Purchases for delivery in the July-June 1986/87 period are currently estimated at 1.2-1.5 million tons. Since 1982/83, French wheat shipments to the USSR have averaged nearly 4 million tons annually.

Hungary has a long term agreement with the USSR providing for annual shipments of 500,000 tons of wheat and corn. Hungary's export availability of wheat and corn in 1986/87 is reduced, reflecting this year's smaller crop outturn.

This year's grain agreement between India and the USSR provides for wheat trade of 500,000 tons. Under the terms of the contract signed last year, the USSR can ship this wheat to third countries.

Austria's trade agreement with the USSR calls for annual shipments of 250,000 tons of wheat. Sales of around 60,000 tons have been reported so far this year.

The U.S.-USSR Long-Term Grain Agreement calls for minimum purchases of wheat and corn for the October-September period of 9 million tons. At least 4 million tons must be wheat and at least 4 million must be corn. USSR

purchases of wheat have fallen short of the minimum for the past 2 years. Since October 1, 1986, the USSR has purchased no U.S. grain. The United States is likely to face intense competition for any grain sales to the USSR for the balance of the marketing year, given this year's low level of USSR grain import requirements.

Domestic Use Increases

The estimate of grain used domestically in 1986/87 has been set at 222 million tons, the highest level in 6 years. Large livestock inventories and expectations of a continuing strong livestock sector have resulted in a grain for feed use estimate of a record 127 million tons. The estimate of coarse grains moving into feed use is large reflecting recent policy decisions, under which emphasis was placed on procurement of wheat from the 1986 crop. Consequently, it is expected that a greater share of the coarse grain harvest was kept on farms. Favorable harvesting conditions for the 1986 crop along with heavy emphasis on improved management practices are reflected in an estimate of dockage and waste of 9 percent of the harvest or 19 million tons. The estimate of grain used for food, seed, and industrial use holds at the recent level of 76 million tons. As 1986/87 grain supplies are substantially above annual requirements, the USSR could add nearly 10 million tons to stocks. Stocks had already grown by over 25 million tons the 4 preceding years. This more comfortable stocks position could be another factor behind the USSR's reduced grain purchasing activity this year.

Record Livestock Inventories, Output Up Strongly

As of November 1, inventories of cattle, hogs, and poultry on state and collective farms were all at record levels. This contrasts with the situation a year ago, when cattle and hog inventories were still recovering from the winter-spring 1984/85 drawdowns.

Livestock output on state and collective farms is increasing at the fastest rate in 3 years. For the January-October period, meat production was up 7 percent, milk production, 5 percent, and egg production, 7 percent. These growth rates have shown no tendency to slow down in the last few months and indicate both ample domestic feed supplies and noticeable improvement in productivity per head in 1986.

USSR: Livestock Inventories on State and Collective Farms November 1, 1982-86

| | 1982 | 1983 | 1984 | 1985 | 1986 |
|--------------------|-------|-------|-------|-------|-------|
| -- million head -- | | | | | |
| Cattle | 91.0 | 93.1 | 95.1 | 94.6 | 95.9 |
| of which cows | 29.7 | 29.7 | 29.6 | 29.3 | 29.0 |
| Hogs | 58.6 | 60.8 | 61.5 | 59.8 | 62.2 |
| Sheep and goats | 118.0 | 120.2 | 118.9 | 116.1 | 118.3 |
| Poultry | 713.0 | 728.5 | 748.3 | 764.3 | 766.1 |

USSR: Livestock Production on State and Collective Farms
January-November, 1982-86

| | 1982 | 1983 | 1984* | 1985 | 1986 |
|---------------------------|--------|--------|--------|--------|---------|
| -- million tons -- | | | | | |
| Total meat, liveweight | 13,094 | 13,922 | 14,725 | 15,141 | 16,223 |
| Milk | 55,369 | 59,490 | 60,405 | 61,253 | 64,193* |
| Eggs, million | 40,625 | 42,755 | 43,964 | 45,102 | 48,105 |

*Adjusted for consistency with earlier data.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1985, and 1986 (Forecast)

| Grain | Area (<u>Million Hectares</u>) | Yield (Metric Tons) (<u>Per Hectare</u>) | Production ^{1/} (<u>Million</u>) (<u>Metric Tons</u>) |
|------------------------------------|-------------------------------------|--|--|
| <u>Wheat</u> | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 | 59.2 | 1.37 | 81.1 |
| 1982 | 57.3 | 1.47 | 84.3 |
| 1983 | 50.8 | 1.52 | 77.5 |
| 1984 | 51.1 | 1.34 | 68.6 |
| 1985 | 50.3 | 1.55 | 78.1 |
| 1986 (Forecast) | 48.7 | 1.79 | 87.0 |
| <u>Coarse Grains ^{2/}</u> | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.39 | 80.5 |
| 1981 | 58.0 | 1.19 | 69.3 |
| 1982 | 58.0 | 1.58 | 91.8 |
| 1983 | 61.2 | 1.67 | 101.9 |
| 1984 | 59.2 | 1.53 | 90.5 |
| 1985 | 58.5 | 1.71 | 100.0 |
| 1986 (Forecast) | 58.3 | 1.85 | 108.0 |
| <u>Total Grain ^{3/}</u> | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 | 125.6 | 1.26 | 158.2 |
| 1982 | 123.0 | 1.52 | 186.8 |
| 1983 | 120.8 | 1.59 | 192.2 |
| 1984 | 119.6 | 1.44 | 172.6 |
| 1985 | 117.9 | 1.62 | 191.7 |
| 1986 (Forecast) | 116.5 | 1.80 | 210.0 |

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

| Year | USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87 | | | | | | | | | | Stock Change/ July/June |
|-------------------|---|---------|-----------------|-----------------------|------------------------|-----------------------|------------|----------|----------|----------|----------------------------|
| | Trade (Jul/June) | | Availability 1/ | | Total 1/ | | Seed | | Food | | Feed |
| | Imports | Exports | July/June | (Million Metric Tons) | Total 1/ | (Million Metric Tons) | Industrial | Waste 2/ | Dockage/ | Waste 2/ | |
| | Production | | | | | | | | | | |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | Total Grains 4/ 178 | 25 | 5 | 45 | 14 | 89 | -12 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 220 | 26 | 5 | 45 | 31 | 113 | +12 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 229 | 26 | 5 | 45 | 29 | 124 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 230 | 25 | 6 | 46 | 28 | 125 | +20 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 223 | 26 | 6 | 46 | 22 | 123 | -14 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 224 | 25 | 6 | 46 | 28 | 119 | -1 |
| 1981/82 5/ | 158 | 47.3 | 0.5 | 205 | 211 | 25 | 5 | 47 | 16 | 118 | -6 |
| 1982/83 5/ | 187 | 34.3 | 0.5 | 221 | 213 | 25 | 5 | 47 | 18 | 118 | +8 |
| 1983/84 5/ | 192 | 32.5 | 0.5 | 228 | 218 | 26 | 5 | 47 | 21 | 120 | +6 |
| 1984/85 5/ | 173 | 55.5 | 0.5 | 228 | 219 | 24 | 6 | 47 | 19 | 123 | +9 |
| 1985/86 5/ | 192 | 29.9 | 0.5 | 221 | 218 | 24 | 5 | 47 | 18 | 124 | +4 |
| Projected 1986/87 | 210 | 21.0 | 1.0 | 230 | 222 | 24 | 5 | 47 | 19 | 127 | +8 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | Wheat 86 | 13 | 1 | 35 | 7 | 30 | -10 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 13 | 2 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 109 | 14 | 2 | 35 | 14 | 44 | -11 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 13 | 2 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 114 | 13 | 2 | 35 | 11 | 53 | -12 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 113 | 13 | 2 | 35 | 15 | 48 | +1 |
| 1981/82 5/ | 81 | 20.3 | 0.5 | 101 | 104 | 11 | 2 | 36 | 8 | 47 | -3 |
| 1982/83 5/ | 84 | 20.8 | 0.5 | 105 | 101 | 11 | 2 | 36 | 8 | 44 | +4 |
| 1983/84 5/ | 78 | 20.5 | 0.5 | 98 | 93 | 11 | 2 | 36 | 9 | 35 | +4 |
| 1984/85 5/ | 69 | 28.1 | 0.5 | 96 | 91 | 11 | 2 | 36 | 8 | 35 | +5 |
| 1985/86 5/ | 78 | 15.7 | 0.5 | 93 | 92 | 11 | 1 | 36 | 8 | 36 | +2 |
| Projected 1986/87 | 87 | 12.0 | 1.0 | 98 | 92 | 11 | 1 | 36 | 8 | 36 | +6 |
| 1975/76 | 66 | 15.6 | -- | 81 | Coarse Grains 83 | 11 | 4 | 7 | 6 | 56 | -2 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 115 | 11 | 3 | 7 | 16 | 78 | +4 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 108 | 10 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 112 | 10 | 4 | 7 | 13 | 79 | +2 |
| 1979/80 | 81 | 18.4 | -- | 100 | 102 | 12 | 4 | 7 | 10 | 68 | -2 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 101 | 12 | 4 | 7 | 12 | 66 | -2 |
| 1981/82 5/ | 69 | 26.0 | -- | 95 | 98 | 13 | 3 | 7 | 7 | 68 | -3 |
| 1982/83 5/ | 92 | 12.5 | -- | 104 | 101 | 13 | 3 | 7 | 9 | 69 | +4 |
| 1983/84 5/ | 102 | 11.5 | -- | 113 | 112 | 13 | 3 | 7 | 11 | 78 | +2 |
| 1984/85 5/ | 90 | 26.9 | -- | 117 | 114 | 12 | 4 | 7 | 10 | 81 | +4 |
| 1985/86 5/ | 100 | 13.7 | -- | 114 | 112 | 12 | 4 | 7 | 9 | 80 | +2 |
| Projected 1986/87 | 108 | 8.0 | -- | 116 | 114 | 12 | 4 | 7 | 10 | 81 | +2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

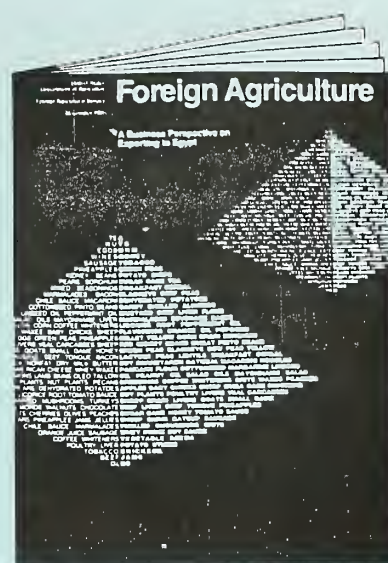
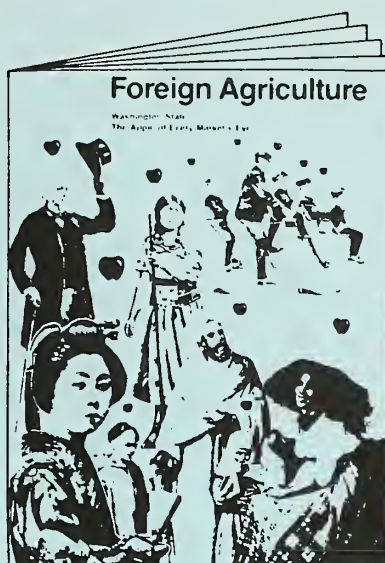
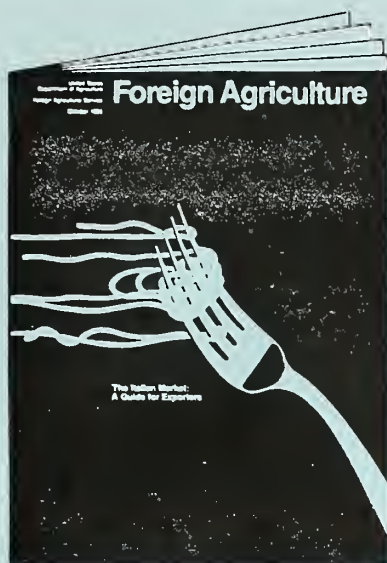
| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|----------------|-------|--------|-----------|----------|-----------|-----------|----------|
| July 1983 | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 | 933 | 3,641 | |
| June | 255 | 1,124 | --- | 155 | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 845 | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 59 | 286 | 2,143 | |
| August | 1,231 | 1,408 | 115 | 444 | 330 | 3,528 | |
| September | 2,172 | 1,254 | 132 | 943 | 293 | 4,794 | |
| July-Sept | 3,662 | 4,143 | 305 | 1,446 | 909 | 10,465 | 11,300 |
| October | 2,320 | 809 | 152 | 966 | 302 | 4,549 | |
| November | 3,014 | 961 | 244 | 840 | 99 | 5,158 | |
| December | 3,535 | 96 | 100 | 512 | 230 | 4,473 | |
| Oct-Dec | 8,869 | 1,866 | 496 | 2,318 | 631 | 14,180 | 14,800 |
| January 1985 | 2,218 | 98 | 154 | 599 | 1,082 | 4,151 | |
| February | 2,196 | --- | 215 | 572 | 1,248 | 4,231 | |
| March | 2,023 | 17 | 667 | 934 | 926 | 4,567 | |
| Jan-March | 6,437 | 115 | 1,036 | 2,105 | 3,256 | 12,949 | 14,000 |
| April | 2,016 | 388 | 716 | 930 | 1,225 | 5,275 | |
| May | 1,566 | 1,237 | 468 | 921 | 1,368 | 5,560 | |
| June | 106 | 481 | 211 | 1,116 | 580 | 2,494 | |
| April-June | 3,688 | 2,106 | 1,395 | 2,967 | 3,173 | 13,329 | 14,700 |
| July | 8 | --- | 25 | 208 | 443 | 684 | |
| August | --- | --- | --- | 152 | 281 | 433 | |
| September | --- | 1,384 | --- | 75 | 59 | 1,518 | |
| July-Sept | 8 | 1,384 | 25 | 435 | 783 | 2,635 | 3,600 |
| October | 411 | 1,057 | 89 | 200 | 316 | 2,073 | |
| November | 2,487 | 900 | 212 | 485 | 423 | 4,507 | |
| December | 1,337 | 750 | 101 | 1,155 | 57 | 3,400 | |
| Oct-Dec | 4,235 | 2,707 | 402 | 1,840 | 796 | 9,980 | 11,400 |
| January 1986 | 980 | 171 | 450 | 1,160 3/ | 15 | 2,776 | |
| February | 956 | --- | 494 | 1,080 3/ | --- | 2,530 | |
| March | 71 | --- | 850 | 852 3/ | --- | 1,773 | |
| Jan-March | 2,007 | 171 | 1,794 | 3,092 3/ | 15 | 7,079 | 7,900 |
| April | --- | --- | 373 | 487 3/ | --- | 860 | |
| May | 172 | 435 | 575 | 445 3/ | 220 | 1,847 | |
| June | 547 | 646 | 34 | 582 3/ | 172 | 1,981 | |
| April-June | 719 | 1,081 | 982 | 1,514 | 392 | 4,688 | 6,400 |
| July | --- | 604 | --- | 51 3/ | --- | 655 | |
| August | --- | 501 | --- | 50 3/ | --- | 551 | |
| September | --- | 666 | 14 | 50 3/ | --- | 730 | |
| July-September | --- | 1,771 | 14 | 151 3/ | --- | 1,936 | 2,600 |
| October | --- | 1,027 | 211 | 300 3/ | --- | 1,538 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available



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